



This is a digital copy of a book that was preserved for generations on library shelves before it was carefully scanned by Google as part of a project to make the world's books discoverable online.

It has survived long enough for the copyright to expire and the book to enter the public domain. A public domain book is one that was never subject to copyright or whose legal copyright term has expired. Whether a book is in the public domain may vary country to country. Public domain books are our gateways to the past, representing a wealth of history, culture and knowledge that's often difficult to discover.

Marks, notations and other marginalia present in the original volume will appear in this file - a reminder of this book's long journey from the publisher to a library and finally to you.

Usage guidelines

Google is proud to partner with libraries to digitize public domain materials and make them widely accessible. Public domain books belong to the public and we are merely their custodians. Nevertheless, this work is expensive, so in order to keep providing this resource, we have taken steps to prevent abuse by commercial parties, including placing technical restrictions on automated querying.

We also ask that you:

- + *Make non-commercial use of the files* We designed Google Book Search for use by individuals, and we request that you use these files for personal, non-commercial purposes.
- + *Refrain from automated querying* Do not send automated queries of any sort to Google's system: If you are conducting research on machine translation, optical character recognition or other areas where access to a large amount of text is helpful, please contact us. We encourage the use of public domain materials for these purposes and may be able to help.
- + *Maintain attribution* The Google "watermark" you see on each file is essential for informing people about this project and helping them find additional materials through Google Book Search. Please do not remove it.
- + *Keep it legal* Whatever your use, remember that you are responsible for ensuring that what you are doing is legal. Do not assume that just because we believe a book is in the public domain for users in the United States, that the work is also in the public domain for users in other countries. Whether a book is still in copyright varies from country to country, and we can't offer guidance on whether any specific use of any specific book is allowed. Please do not assume that a book's appearance in Google Book Search means it can be used in any manner anywhere in the world. Copyright infringement liability can be quite severe.

About Google Book Search

Google's mission is to organize the world's information and to make it universally accessible and useful. Google Book Search helps readers discover the world's books while helping authors and publishers reach new audiences. You can search through the full text of this book on the web at <http://books.google.com/>

HF

105

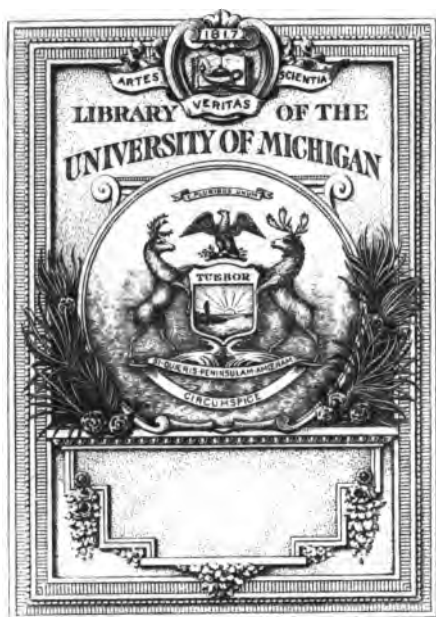
.C27

no.14

STORAGE

1 a 6

B 446103



HF
105
. C 27
no. 14
60TH CONGRESS }
1st Session }

SENATE

{ DOCUMENT
No. 79

Special Agent's Bureau 14

REPORT ON LEATHER AND BOOTS AND SHOES IN EUROPEAN MARKETS

By

ARTHUR B. BUTMAN

Special Agent of the Department of Commerce and Labor

TO WHICH ARE ADDED REPORTS FROM CONSULAR
OFFICERS IN VARIOUS COUNTRIES, REPRINTED
FROM CONSULAR AND TRADE REPORTS

DECEMBER 9, 1907

Referred to the Committee on Commerce and ordered to be printed

WASHINGTON
GOVERNMENT PRINTING OFFICE
1907

DEPARTMENT OF COMMERCE AND LABOR,
OFFICE OF THE SECRETARY,
Washington, December 5, 1907.

SIR: I have the honor to transmit herewith report of Special Agent Arthur B. Butman on "Leather and boots and shoes in European markets," in compliance with the act making appropriations for the legislative, executive, and judicial expenses of the Government for the fiscal year ended June 30, 1907, approved June 22, 1906, which directs that results of investigations by special agents to inquire into trade conditions abroad shall be communicated to Congress.

Respectfully,

OSCAR S. STRAUS,
Secretary.

The PRESIDENT OF THE SENATE.

CONTENTS.

HF
105
C27
no. 14

EUROPEAN MARKETS.

	Page.
Letter of submittal.....	5
Introduction.....	7
United Kingdom.....	10
Comparison of American with British trade.....	10
European imitation of American tanning methods.....	10
Value of American exports and relative share of countries.....	11
Superiority of American shoes.....	15
Obstacles to United States trade.....	15
Cost of manufacture.....	16
France.....	21
Superior quality of French footwear.....	21
Imitations of American shoes.....	21
Imports of footwear from the United States.....	22
French method of measurement.....	23
American shoe store in Paris.....	24
Styles that sell best.....	25
American trade increasing.....	25
Prices and customs duties.....	25
Market for findings.....	26
Cost of production.....	26
Germany.....	29
Factories and methods of operation.....	29
Use of American shapes and leather.....	30
Cost of production.....	31
Austria-Hungary.....	32
Progress in manufacture for home market.....	32
Imports of American goods.....	33
Tariff rates.....	33
Italy.....	34
High reputation for American shoes.....	34
Machinery and materials.....	35
Tanning.....	35
Prices and styles.....	36
Presence of American shoes.....	37
Cost of findings.....	37
The Netherlands.....	38
Small participation by United States.....	38
Suggestions for manufacturers.....	39
Belgium.....	40
Inviting market neglected.....	40
Requirements of the market.....	41
Sale of American makes.....	41
Climatic conditions.....	42
Tanning and shoe industries.....	42
Hours of labor.....	43

	Page.
Switzerland.....	43
Products of local factories.....	43
Labor and style of product.....	44
American shoe machinery.....	44
Hours of labor.....	44
Exports and imports.....	45
Taxations for American stores.....	46
Cost of production.....	46

MISCELLANEOUS MARKETS.

Australasia	49
Inviting market.....	49
Shoes and slippers.....	49
Preferential rates and prices.....	50
Local factories.....	50
Brazil	51
Trade in shoes and shoe-making machinery.....	51
Boot and shoe developments.....	52
Leather imports.....	53
Demand for shoes of special kind.....	53
Canada.....	54
Tariff rates affect American imports.....	54
New tariff a factor.....	54
Ecuador.....	55
Profitable business established.....	55
Popular requirements.....	55
Japan	56
Imitation leather will find many uses.....	56
Mexico.....	56
American makes in demand.....	56
Turkey.....	57
Sources and classes of supply.....	57
Subsidiary goods.....	57
Leather for harness.....	58
Sole-leather cuttings.....	58
Side lines and shoemakers' requisites.....	58
Asiatic Turkey	59
Prospects for American footwear.....	59
Trade in rubber overshoes.....	59
Favorable opportunity.....	59
Wales	60
American shoes popular.....	60

LETTER OF SUBMITTAL.

BROCKTON, MASS., *June 15, 1907.*

SIR: I have the honor to submit herewith a report on the leather and boot and shoe industries of the principal countries of western Europe. My investigations, covering a period of several months, extended over England, Belgium, the Netherlands, France, Italy, Switzerland, Austria-Hungary, and Germany. Market conditions in these countries were investigated with special regard to importations and sales of leather and its manufactures from the United States. The estimation in which American boots and shoes are popularly regarded is briefly described and suggestions offered for enlarging our European sales.

Respectfully,

ARTHUR B. BUTMAN,

Special Agent of the Department of Commerce and Labor.

To Hon. OSCAR S. STRAUS,

Secretary of Commerce and Labor.

INTRODUCTION.

The investigations upon which is based a review of the leather and boot and shoe industries in Europe, as briefly set forth in the accompanying report, had as its principal objects the obtaining of an intimate knowledge of existing industrial conditions in their bearing on trade conditions in our own country, together with a like knowledge of existing difficulties to this trade and the making of suggestions for remedying the same.

Leading American shoe manufacturers are now seeking foreign markets for their products in the representative cities of the world, and that they are meeting with some success is evidenced by the fact that already they are sending their shoes to 60 different countries; but the question which must interest every one of them is: Are they doing all that might be done to enlarge their export business? It is a fact that many things hinder the advance of this trade; among them the difficulties incident to the refusal of our exporters to grant such terms of credit as are allowed by competitors in the various countries where it is desired to introduce goods; slow delivery of goods; careless packing; failure to furnish the exact kind and quality of goods promised, which includes lack of attention to details and a not infrequent disregard of the especial needs and tastes of the various localities.

Another important difficulty and one that should receive prompt attention is the very general imitation by European manufacturers of the American shoe and its advertisement under terms often so misleading as to give the impression that the product is of American manufacture. As a safeguard against this counterfeiting, as well as the flooding of the markets with inferior goods purporting to be of first value, it is suggested that American trade-marks be registered in each country into which our shoes are introduced and that all footwear be stamped not only with the words "Made in the United States of America," but also with the name and address of the local foreign dealer and the price in the various moneys of the principal European countries; that is, if the shoe is to be sold in France, the retail selling price should be stamped on the sole in francs; if in Italy, in lire, etc. The importance of such action can not be too strongly urged. It is desired to bring this fact of imitation before the American shoe manufacturer as it exists, in the hope that it will in no way lessen, but rather stimulate his efforts for further sales of genuine American-made goods.

Traveling salesmen and resident agents each have their own value as factors in trade extension in Europe. The former should be efficiently trained and able to speak fluently the language of the country to which he may be assigned. The method, however, which assures the largest measure of success is that of the established American firm, or, in other words, the European retail store, established and managed by the American manufacturer. Second in value is the exclusive American agency, managed preferably by an American speaking the language of the country, or at least by a native having no other interests. The resident agent would receive his stock direct from the factory, while, under existing methods, American goods often are purchased through agencies in London or Paris, necessitating profits for two or three middlemen and additional transportation charges, which tend to restrict sales both by reason of delay and inconvenience as well as price.

It may not be amiss to again remind our manufacturers that what suits the American trade may not always prove attractive to the foreign markets, and that to secure their trade we must devote care and thought to their requirements.

One obstacle to a greater advance in sales of American footwear in several European countries is the quality of sole leather used for that trade. It is important that the climatic conditions of the various countries be taken into account by our manufacturers. Consideration should also be given to the fact that the custom of wearing rubber footwear (rubbers) is by no means general among Europeans, and that consequently the use of a porous sole leather renders our shoes unfit for winter wear by them.

Our shoe manufacturers certainly know the art of secure and attractive packing, and when goods are furnished to those countries where attention to detail is strictly required we should not be found wanting in this respect. Care should continue to be given to this most important detail, remembering also that the value of the shoe is often enhanced by an attractive carton.

Advertising should be carefully considered. Window cards and illustrated catalogues in the several foreign languages should be furnished by the manufacturer, and space provided in the local newspapers for resident agencies. Money must be spent if we would succeed in the face of active competition.

One great reason for the excellence of the American shoe is the fact that in America each person in his department of the factory is a specialist. The European shoe manufacturer does not specialize; he turns out men's, women's, and children's shoes, cuts sole leather, and makes findings all under the same roof. It has been said, and truly, that the American shoemaker is "the best fed, the best paid, and the most skilled in the world," and as a result the excellence

and popularity of his product is evinced in all countries. The name "American shoe" is used as a business medium, and our shoes are everywhere remarked for their comfort, style, and finish.

That we have not done a larger export trade in manufactured articles in the past has been partially, at least, owing to the fact that we were not obliged to seek foreign markets for our products; but we have, however, made a very good showing in shoe exports. Our manufacturers have but to awaken to the possibilities which their unequaled product affords, and to devote the time and money necessary to the understanding of local conditions, the requirements of the people, and their business methods, and having learned these, to deal with them with the same activity and seriousness as are devoted to the home trade.

LEATHER AND BOOTS AND SHOES IN EUROPEAN MARKETS.

THE UNITED KINGDOM.

COMPARISON OF AMERICAN WITH BRITISH TRADE.

No industry in the United States can look back upon a better record than that made by the manufacturers of leather and boots and shoes. The importance of this industry to the United States is manifest by the immense production of the country—a home business fast approaching \$400,000,000, and a foreign trade of nearly \$10,000,000 per annum—showing that efforts made in recent years to secure foreign markets for our footwear and other leather productions have been attended with a large measure of success. To-day American shoes are sent to 60 countries and may be found in the chief cities of the five continents.

The year 1906 will be memorable for the shoe-manufacturing industry, because for the first time our shoe exports exceeded in value the shoe exports from Great Britain. The comparisons for three years are as follows:

EXPORTS OF SHOES FROM THE UNITED STATES AND GREAT BRITAIN, 1904-1906.

Year.	United States.		Great Britain.	
	Pairs.	Value.	Pairs.	Value.
1904.....	4,806,279	\$7,319,775	8,107,824	\$7,696,138
1905.....	5,672,221	8,650,012	9,149,539	9,159,834
1906.....	5,336,106	9,663,751	9,527,921	9,539,672

In the number of pairs exported it will be noticed that England is still in the lead, but we are selling better grades, and so take the first place in values. Our increase, moreover, is a recent development, because as far back as 1870 England was exporting shoes to the value of \$7,000,000, while our exports were less than \$500,000.

EUROPEAN IMITATION OF AMERICAN TANNING METHODS.

For a long time American sole leather found high favor in certain parts of Europe, and would doubtless still be sold there in larger quantities but for the successful efforts of Heyl, Doerr, and Reinhart

at Worms, on the Rhine, to secure the secrets of its production. By putting the chemist and the tanner side by side these men were able to produce a sole leather which they claimed was equal to that of the United States in appearance, if it did not surpass it in durability. The claim was made by Massachusetts and Wisconsin tanners that the German product was by no means as durable as the product of the tanneries of Danvers, Beverly, and other places in this country. One thing is certain in this connection—foreign competitors are sparing no effort to secure a knowledge of our best methods, those that have led to the successful production of excellent leathers of all kinds, and to make new discoveries by original research in the laboratories connected with many of their tanneries. Austria, celebrated for certain leathers, has an excellent tanning school in Vienna. Germany, our most vigilant and forceful rival, established a splendid tanning school in Freiburg, Saxony, 25 miles from Dresden, and supplied it with all the most modern machinery used in this country; and to preside over it as head director secured a man who had been fifteen years a manager of tanneries in Milwaukee.

On one occasion, anxious to learn how American tanners produced such excellent chrome leather, the Germans sent a commission, headed by a distinguished manufacturer of patent leather, to this country to study our methods. If correctly reported, this commission went back only fairly successful, but by pursuing the German method of research, laboratory experimentation, putting the chemist and the practical tanner side by side, they claim to have reached satisfactory results.

VALUE OF AMERICAN EXPORTS AND RELATIVE SHARE OF COUNTRIES.

The story of leather exports from the United States will be found in the tables herewith given. It is interesting to note that in 1892, only fifteen years ago, the total exports of leather and its manufactures amounted to only a little over \$12,000,000. To-day it aggregates \$40,000,000, and is increasing so rapidly that the \$50,000,000 mark is fairly in sight. For the fiscal year ended June 30, 1906, our exports of leather of all kinds aggregated \$40,642,858, and of this amount \$9,142,748 represents boots and shoes. The table which follows shows the exports in detail for the fiscal year 1906 and the markets to which exported. To illustrate the progress made and the present volume of the trade, comparison is made with the figures for the fiscal year 1902.

GROWTH OF THE EXPORT TRADE OF THE UNITED STATES IN LEATHER AND ITS MANUFACTURES, BY COUNTRIES.

Article and whither exported.	1902.	1906.	Increase (+) or decrease (—).
Leather:			
Sole leather—			
United Kingdom.....	\$5,383,944	\$5,956,092	+ \$572,148
Japan.....	278,967	1,333,130	+1,054,163
Belgium.....	165,094	316,903	+ 151,809
British North America.....	134,560	155,258	+ 20,698
All other countries.....	607,292	424,896	— 182,396
Total sole leather.....	6,569,857	8,186,279	+1,616,422
Kld, glazed, patent, or enameled, splits, buff, grain, etc.—			
Europe.....	13,868,130	17,107,278	+3,239,148
North America.....	680,210	1,549,828	+ 869,618
South America.....	308,799	791,646	+ 482,847
Asia.....	54,889	861,666	+ 806,777
Oceania.....	825,038	868,619	+ 43,581
Africa.....	43,211	51,621	+ 8,310
Total leather other than sole.....	15,780,277	21,230,558	+5,450,281
Total leather.....	22,350,134	29,316,847	+7,066,703
Leather manufactures:			
Boots and shoes—			
Europe—			
United Kingdom.....	2,013,890	1,862,747	— 151,143
Germany.....	197,937	387,025	+ 189,088
France.....	97,081	126,239	+ 29,158
All other.....	80,997	215,133	+ 134,136
Total to Europe.....	2,389,905	2,591,144	+ 201,239
North America.....	2,293,560	5,367,349	+3,073,789
South America.....	165,863	363,310	+ 197,447
Asia.....	47,379	80,868	+ 33,489
Oceania.....	1,005,370	552,104	— 453,266
Africa.....	280,021	187,973	— 92,048
Total boots and shoes.....	6,182,098	9,142,748	+2,960,650
Harness and saddles.....	378,775	691,575	+ 312,800
All other leather manufactures.....	887,316	1,491,688	+ 604,372
Total leather manufactures.....	7,448,189	11,326,011	+3,877,822
Grand total leather exports.....	29,798,323	40,642,858	+10,944,525

British markets are by far our most important in practically all lines of leather goods with the exception of boots and shoes, and in foot wear the United Kingdom takes about \$2,000,000 worth of American goods annually. The United States is a cattle-raising country, with an abundance of native tanning material. England does not raise the number of cattle sufficient for her requirements, and has very little native tanning material; therefore hides and tanning material or tanned leather must be imported.

The position on sole and heavy upper leathers is a comparatively secure one for the American tanner. Regarding goatskin leathers, American manufacturers perfected, as previously mentioned, the chrome tanning process and English leather dressers have yet to reach the American standard.

Large supplies of box calf are yearly imported from the Continent for English consumption. The American leather trade in England is in the hands of substantial British merchants, many of whom have been for years engaged in its importation.

The detailed leather exports of the United States for the past three fiscal years, with the part taken by the United Kingdom, are as follows:

LEATHER EXPORTS OF THE UNITED STATES TO THE UNITED KINGDOM AND TO ALL COUNTRIES, 1904-1906.

Article.	To United Kingdom.			To all countries.		
	1904.	1905.	1906.	1904.	1905.	1906.
Sole leather.....	\$5,611,423	\$4,449,410	\$5,956,092	\$6,978,497	\$9,444,873	\$3,186,279
Upper leather:						
Glazed kid.....				1,512,179	1,576,204	1,922,430
Patent.....				170,940	166,320	143,590
Splits.....	11,345,111	11,072,078	11,274,750	15,049,602	15,057,791	17,242,011
All other.....				1,140,364	1,813,154	1,822,537
Boots and shoes.....	1,868,894	1,943,845	1,862,747	7,238,940	8,057,697	9,142,748
Harness and saddles.....				560,346	502,660	691,575
All other.....				1,329,747	1,318,046	1,491,688
Total.....	18,825,428	17,465,333	19,093,589	33,980,615	37,936,745	40,642,858

The share going to Great Britain of "Harness and saddles" and "All other" leather in the above table of exports is not detailed in the statistical returns of the Government, and the relatively small amounts can not be included in the total purchases of that country from the United States.

Serious complaints were submitted to me by British leather importers, who maintained that a large quantity of American sole leather had been adulterated to the detriment of the trade, but the same charge was made against other such leather, including that tanned in Great Britain.

Boots and shoes were imported by Great Britain from foreign countries, not including British possessions, for the calendar years 1905 and 1906 as follows:

IMPORTS OF BOOTS AND SHOES INTO GREAT BRITAIN, BY COUNTRIES, 1905 AND 1906.

Whence Imported.	1905.		1906.	
	Dozen pairs.	Value.	Dozen pairs.	Value.
United States.....	90,239	\$2,147,046	80,927	\$2,165,540
Belgium.....	42,196	517,236	41,443	531,047
France.....	29,239	639,415	31,790	609,015
Germany.....	18,373	228,472	25,423	336,961
Netherlands.....	34,220	520,570	31,263	443,591
Other countries.....	197	2,813	101	1,830
Total.....	214,464	4,055,552	210,947	4,088,084

These statistics show that the United States supplies by far the larger percentage of shoes imported. The following table shows the British export of boots and shoes for the calendar years 1905 and 1906:

EXPORTS OF BOOTS AND SHOES FROM THE UNITED KINGDOM, BY COUNTRIES,
1905 AND 1906.

Whither exported.	1905.		1906.	
	Dozen pairs.	Value.	Dozen pairs.	Value.
Foreign countries:				
Germany.....	4,678	\$74,035	6,842	\$117,726
Netherlands.....	22,082	199,506	22,940	157,136
Belgium.....	4,950	66,180	6,904	117,777
France.....	14,513	464,531	20,597	667,251
Portuguese East Africa.....	7,355	98,352	6,892	90,682
Egypt.....	6,955	105,341	9,382	145,708
Peru.....	4,016	52,553	4,529	92,556
Chile.....	6,315	56,530	6,773	66,837
Brazil.....	2,186	36,672	2,459	45,570
Argentina.....	4,912	110,173	14,599	168,785
All other.....	15,697	215,911	16,005	242,654
Total.....	93,659	1,479,784	118,152	1,942,692
British possessions:				
Channel Islands.....	18,103	174,075	17,886	175,073
Africa.....	380,960	4,870,554	357,612	4,474,207
British India.....	69,802	836,518	53,488	719,435
Straits Settlements.....	6,382	67,837	8,418	118,528
Australia.....	70,050	510,257	90,162	626,046
New Zealand.....	68,451	725,539	72,771	814,998
West Indies.....	25,987	221,138	34,716	306,614
Guiana.....	5,497	45,921	7,122	62,335
Other.....	18,170	229,597	23,647	282,539
Total.....	680,402	7,861,886	665,822	7,579,775
Grand total.....	774,061	9,341,670	783,974	9,522,467

Leicester, the county town of Leicestershire, in the North Midlands, with a population of about 225,000, is the chief seat of the shoe industry in England. The boot and shoe factories of this town number 140, with an average output of about 400 pairs per day each, the largest factory producing from 1,200 to 1,500 pairs per day.

The boot and shoe industry of England has very greatly improved within the past few years, in consideration of which the following facts may be stated: British ports are open to receive American leather and American shoemaking machinery duty free; an American shoe-machinery company has an affiliated organization in the Kingdom, and the principal factories are fitted with the most improved American machinery, and labor is slowly, but gradually, gaining in skill with the advent of modern equipment. However, notwithstanding the splendid showing which the British manufacturer is now able to make over that of a few years ago, it is still impossible for him to produce a shoe equal in all respects to the American product. Until a large number of skilled operatives find their way into the British manufactory, the American shoe must lead by reason of its superb finish and splendid style.

SUPERIORITY OF AMERICAN SHOES.

The American manufacturer has not to convince the English buyer of the superiority of the American shoe—the Englishman already knows this—but the point on which the English buyer must be convinced is that the American manufacturer will furnish exactly the kind and quality promised. The reputation which has been acquired by American-made shoes is the best; but of course the volume of export trade must largely depend upon manufacturing an article suited to the people and the country for which it is destined. If the tastes of the English people were more carefully studied and conformed to, the market for American shoes in England would be a far larger one than at present. One great essential in that country is precision. Dealers insist that when goods are ordered from samples of certain quality and style exactly that quality and that style are desired, and no substitute, though equally good or better, of any part or portion is wanted.

It is evident from figures previously given that while we can sell some of our best grades in the English markets, the manufacturers there are in a strong position with the lower-priced lines, where the labor cost counts for more in proportion, and it is in these lines that the English manufacturers are making steady gains in exporting.

OBSTACLES TO UNITED STATES TRADE.

One of the difficulties which the American shoe manufacturer has to encounter in Great Britain results from the fact that the average retail shoe dealer with only one or two stores relies largely for his supplies upon boot factors, or, as we term them, jobbers; and the average English boot factor is prejudiced against American goods. Furthermore, the factor, or jobber, likes to deal with manufacturers who allow much longer credits than American shoe manufacturers are willing to grant. The result has been that, while we have a considerable shoe trade in Great Britain, those American firms who have done the best have been those who have opened their own stores and deal directly with the public.

It may be of value here to sum up the fundamental principles which stand for a successful American shoe trade with Great Britain. The English carry their conservatism into foreign trade. Goods once established command ready future sales if the quality is maintained, while goods found not as represented are very apt to be discontinued, even though they may afterwards be made equal to the first standard. There must be conformity to English taste and climatic conditions, and honest effort should be made to ship goods when promised.

COST OF MANUFACTURE.*

Following is the cost of producing the British-made shoe as compared with the American product:

DETAILED COST OF MANUFACTURING ENGLISH AND AMERICAN SHOES.

Classification.	English (per dozen). ^a	American (per 100 pairs). ^a	Classification.	English (per dozen). ^a	American (per 100 pairs). ^a
Cutting outside.....	s. d. 1 9	\$4.25	Pressing vamps.....	s. d.	\$0.33
Cutting linings.....	2	.93	Pressing foxings.....	2½	.33
Stamping linings.....	1½	.08	Pressing front of quarter.....	2½	.41
Skiving.....	3	.48	Pressing back stay.....	2½	.33
Week work.....	3	1.25	Pressing kid tip.....	2½	.16
Total.....	2 3½	6.99	Stitching in box toe.....	2½	.25
Making lining.....	2½	.66	Stitching tip (straight).....	2½	.33
Closing.....	1½	.25	Marking vamp for tip.....	2½	.16
Seam rubbing.....	1½	.08	Gumming corners.....	2½	.16
Staying, double needle.....	1½	.32	Gumming eyelet stays.....	2½	.13
Stitching inside stays, 2 rows.....	1½	.33	Gumming vamp lining and marking size.....	2½	.16
Stitching back stays.....	1½	.50	Gumming tongue lining.....	2½	.15
Stitching foxings.....	1½	.75	Binding tongue.....	2½	.20
Closing on.....	1½	.33	Blackening edges.....	2½	.16
Turning.....	1	.33	Closing toe lining and stitch- ing tongue.....	1	.33
Stitching tops.....	1½	.75	Lacing and packing.....	2½	.33
Eyeletting.....	2½	.33	Week work.....	2½	1.00
Vamping.....	2½	.90	Total.....	2 0½	10.45

Classification.	English (per dozen). ^a	American.	
		McKay \$1.50 (per 100 pairs).	Welt \$2.25 (per 100 pairs).
Fitting stock.....	s. d. 1	\$1.50	\$2.00
Lasting, pulling over.....	2½	3.00	2.00
Lasting sides by hand.....	5	1.50	2.00
Lasting toe and seat, ideal.....	2½	.50	2.00
Lasting sides and toe consol.....	2½	.50	.25
Laying soles.....	2½	.50	.25
Trimming uppers.....	2½	.67	.65
Pulling tacks.....	3½	.58	.20
Sewing McKay and welting.....	2½	.33	.35
Trimming seam.....	2½	.50	.10
Beating welt.....	2½	.16	.32
Filling bottom, tacking in shank, cementing bottom.....	2	.16	.75
Cementing sole.....	2	.42	.21
Sole laying by machine.....	2	.50	1.75
Rough rounding.....	2	.50	.58
Turning channel.....	2	.33	.16
Stitching.....	2	.50	.16
Beating out.....	2	.50	.33
Randing.....	2	.50	.50
Nailing seats.....	2	.50	.33
Nailing heels.....	2	.50	.50
Slugging.....	2	.50	.16
Relasting.....	2	.50	.50
Heel lining.....	2	.50	.16
Heel shaving.....	2	.50	.50
Heel scouring.....	2	.50	.42
Cutting down heels.....	2	.50	.16
Scouring breast.....	2	.50	.25
Trimming edge.....	2	.83	1.50
Stitch separator.....	2	.83	.25
Edge setter.....	2	.83	1.67
Buffing bottom.....	2	.42	.50
Naumkeag cleaning.....	2	.33	.42
Brushing edge.....	2	.04	.04
Brushing stitch.....	2	.04	.04
Hand finish.....	2	.33	.42
Cutting shank.....	2	.25	.25

* Same on both McKay \$1.50 and welt \$2.25.

^b Seat wheel.

DETAILED COST OF MANUFACTURING ENGLISH AND AMERICAN SHOES—Continued.

Classification.	English (per dozen).	American.	
		McKay \$1.50 (per 100 pairs.	Welt \$2.25 (per 100 pairs.
Blacking shank and top.....	s. d.	\$1.00	\$1.25
Burnishing heel.....	9½	.59	.59
Cleaning by hand.....		.42	.42
Bottom lining.....	2	.42	
Kroning, stamping, dressing.....	1 0	2.00	2.00
Packing, etc., week work, estimated.....	1 0	2.00	2.00
All other work in bottoming room.....	3 0½	2.00	2.00
Total.....	9 6½	21.88½	31.67½
Cutting.....	2 3½	6.99	6.99
Fitting.....	2 0½	10.45	10.45
Bottoming.....	9 6½	21.88½	31.67½
Total.....	13 10½	39.32½	49.11½

a \$27.73 per 100 pairs.

Welt work would be about 15 per cent more than McKay price.

ENGLISH PIECEWORK STATEMENT FOR FINISHERS IN CONJUNCTION WITH
MACHINERY.

WOMEN'S WORK—ORDINARY.

Classification.	Per dozen.	Classification.	Per dozen.
Putting in lasts, hinged or solid blocks (lasts to be assorted for use):	Pence.	Heel scouring—Continued.	Pence.
By hand.....	1	Iron heel plates (extra).....	½
By aid of machine or jack.....	½	Brass-plate insertion (extra).....	½
Lasts with loose blocks (extra).....	½	Gumming heels (extra).....	½
Work tied over or buttoned (2 lace holes or 3 buttons) (extra).....	1	Heel trimming:	
Heel paring:		By hand (heels to be breasted before attached).....	1½
Trimming heels and randing same on Smith or similar machine.....	1½	Definition: Clearing breast of heels, cutting down corners, and bit waist form of heels.	
Leather Wurttembergs (extra).....	1½	Heel burnishing:	
Heels over 1½ inches high (extra).....	½	Rockingham or pad and brush, by ma- chine.....	1½
Extra for sharpening knives to the heel parer only.....	a 1	Leather Wurttembergs, 1½ inches high (extra).....	1½
Plowing out by hand:		If faked by hand (extra).....	½
Foreparts only, machine sewn and riveted.....	½	Heels colored for the man.	
Waists.....	½	Seat wheeling:	
Seats.....	½	By machine.....	½
Welted, foreparts only.....	1½	By hand.....	2
Welted, waists only.....	½	Leather Wurttembergs, 1½ inches high, by machine (extra).....	½
Fair stitched, foreparts only.....	1	Leather Wurttembergs, by hand (ex- tra).....	1
Half-wide welts (extra).....	1	Brushing:	
Paring forepart and waists on Russell or any similar machine.....	2	Brushing heels, not padded.....	1
Welts plowed out:		If faked by hand (extra).....	½
Welted.....	2½	Cleaning stitches:	
Fair stitched.....	2½	Cumming, boning, and polishing same.....	3
Bevels.....	3½	Coloring welts, liquid color, fore parts only (extra).....	1
Heel scouring:		Pricking up stitches:	
Rough and fine scouring by 1 man on same machine (heels 1½ inches high, finished).....	1½	By hand, narrow tool.....	6
Over 1½ inches (extra).....	½	By hand, broad tool (extra).....	2
Heel scouring:		By machine, fore parts only.....	3½
Leather Wurttembergs, 1½ inches high (extra).....	3½		

a Per week per man.

**ENGLISH PIECEWORK STATEMENT FOR FINISHERS IN CONJUNCTION WITH
MACHINERY—Continued.**

**EDGE SETTING—TWICE SETTING FOREPARTS AND WAISTS OF ALL GOODS WHICH
HAVE BLACK WELTS.**

Classification.	Standard machine.		Rotary machine.	
	Without wheel (per dozen).	With wheel (per dozen).	With wheel (per dozen).	Without wheel (per dozen).
Ordinary work: ^a	<i>Pence.</i>	<i>Pence.</i>	<i>Pence.</i>	<i>Pence.</i>
Mock welts.....	5½	6½	5½	4½
All welts.....	6	7	5½	4½
Reduction for once setting mock welts with quick edge ink.....	4½			
Black, welted goods.....	7½			6½
Black, fair stitched.....	7½			6½
Color on lip for fair stitched or welted goods (extra).....	1			
Ordinary black stunted beveled.....	8½			7½
Black bevel work, fair stitched.....	9½			8½
Black bevel work, welted.....	9½			8½
Red bevel work, ordinary.....	11			10
Red bevel work, fair stitched.....	11			11
Red bevel work, welted.....	11			11

Classification.	Per dozen.	Classification.	Per dozen.
Stitch wheeling, foreparts only, ordinary work:	<i>Pence.</i>	Marking waists across with dull knife once before painting.....	<i>Pence.</i> 8
By hand.....	2½	Marking out:	
By machine.....	1½	Strips, round or square (after painting).....	1½
Half-wide welts by hand (extra).....	1	Strips, peaked (after painting).....	3
Half-wide welts by machine (extra).....	½	Cleaning strips for inking, round or square.....	1
Bottom scouring:		Cleaning strips for inking, peaked.....	2
Rough scouring bottoms and top pieces with roller.....	½	Cleaning waist iron, strips.....	½
Tips on heels (extra).....	1	Marking out for bordering:	
Slugged bottoms (extra).....	1½	Heel to heel.....	2½
Naumkeag:		Foreparts only.....	1½
Fine scouring bottoms, waists, and toppieces.....	1½	Waists only.....	1½
Scouring front of heels (extra).....	½	Painting bordered work:	
Inking bottoms (1 color to heel).....	1	Heel to heel.....	3½
Quick russet:		Foreparts only.....	2½
Foreparts, black or brown.....	½	Waists only.....	2
Waists.....	½	Inking:	
Toppieces, quick russet, not oakaline.....	½	Strips, round or square.....	1½
Padding and brushing quick black or russet:		Strips, peaked.....	2½
Bottoms (1 color to heel)—		Strips, waist iron.....	½
Black.....	1½	Burnishing:	
Russet.....	1½	Marked-out strips, round or square—	
Foreparts—		By hand.....	2
Black.....	1½	By machine.....	1½
Russet.....	1½	Peaked strips by hand.....	3½
If faked by hand, ½ d. per dozen extra.....		Waist iron strips—	
Waists—		By hand.....	1½
Black.....	1	By machine.....	½
Russet.....	1	Gemming bottoms:	
Toppieces (including faking by hand)—		By hand (after painting), foreparts only.....	½
Black.....	½	By hand (after painting) through.....	1
Russet.....	½	Brushing bottoms:	
Digging front of heels and filling holes.....	1½	By machine (after painting), foreparts only.....	½
Damped-down bottoms:		By machine (after painting) through.....	½
Through by hand, old style.....	1½	Faking by hand and polishing by machine:	
Foreparts only, old style.....	1	Fiddle waists, painted.....	1½
Painting bottoms:		Fiddle bottoms, painted.....	2½
One color.....	1½	Making gummed fiddles not oakaline or paint:	
Two colors.....	2½	Scraping fronts and cutting corners.....	1½
Chrysodene front of heels.....	½	Marking across waist.....	1
Sizing bottoms (extra).....	½	Gumming fiddle waist, front of heel and toppiece.....	2½
Cleaning rivets:		Gumming fiddle bottoms, heel to heel, front of heel, and toppiece.....	4
Oakaline work—		Marking strips.....	1½
Foreparts.....	½	Dull knifing fiddles.....	½
Waists.....	½	Faking fiddle waist and polishing by machine.....	4
Toppieces only.....	½	Faking fiddle bottoms through and polishing by machine.....	6
Black bottoms—			
Foreparts.....	1		
Waists.....	1		
Toppieces only.....	½		

^a The word "ordinary" means machine sewn and riveted work. Edges to be colored and faked by workmen.

^b Per gross.

**ENGLISH PIECEWORK STATEMENT FOR FINISHERS IN CONJUNCTION WITH
MACHINERY—Continued.**

**EDGE SETTING—TWICE SETTING FOREPARTS AND WAISTS OF ALL GOODS WHICH
HAVE BLACK WELTS—Continued.**

Classification.	Per dozen.	Classification.	Per dozen.
Making gummed fiddles not oakaline or paint—Continued.	<i>Pence.</i>	Getting off—Continued.	<i>Pence.</i>
Faking fiddle waist and polishing by hand.....	6	Fancy crowing extra (as per arrangement).....	
Faking fiddle bottoms through and polishing by hand.....	8	Slipping lasts and pairing up in sizes only.....	$\frac{1}{2}$
Cleaning off paint and putting on color for top ironing:		Loose blocks (extra).....	$\frac{1}{2}$
Foreparts by hand.....	1	Louis heel work (wood heels) not covered:	
All round by hand.....	$\frac{1}{2}$	Trimming lifts and toppieces—	
Top ironing:		By hand.....	2 $\frac{1}{2}$
Foreparts by hand.....	2	By machine.....	1
All round by hand.....	3 $\frac{1}{2}$	Trimming corners of heels, by hand.....	$\frac{1}{2}$
Foreparts by self-feeding machine.....	1	Sandpapering corners of heels by hand.....	$\frac{1}{2}$
All round by self-feeding machine.....	$\frac{1}{2}$	Heel scouring, rough and fine, by machine.....	$\frac{1}{2}$
Imitation bunking on oakaline:		Heel padding and seat wheeling by machine.....	$\frac{1}{2}$
Foreparts by hand.....	2	Buffing and sandpapering front of heels and leveling toppieces by hand.....	4
Waists by hand.....	$\frac{1}{2}$	Crowing under toppieces by hand.....	1
All round by hand.....	3	Crowing sides of heels by hand.....	1
Foreparts by machine.....	$\frac{1}{2}$	Cleaning inserted plates by hand.....	$\frac{1}{2}$
Waists by machine.....	$\frac{1}{2}$	Faking and polishing front of heels and waists, stain or quick russet.....	$\frac{1}{2}$
All round by machine.....	2	Faking and polishing front of heels and waists, stain or quick russet, with toppieces.....	$\frac{1}{2}$
Bunking on bottoms other than oakaline:		Getting off heels to be inked and brushed twice by hand, sides of heels to be made good, and burnished, faked, and polished off.....	8
Foreparts—		Louis heel work, leather covered:	
By hand—		Heel scouring, rough and fine.....	2 $\frac{1}{2}$
Bordered.....	3 $\frac{1}{2}$	Padding and seat wheeling.....	3
Bunking.....	4	Setting toppieces.....	$\frac{1}{2}$
By machine, bordered.....	$\frac{1}{2}$	Naumkeeking foreparts, waists, and front of heels.....	$\frac{1}{2}$
Waists—		Painting front of heels, waists, and toppieces.....	$\frac{1}{2}$
By hand—		Brushing, faking, and polishing waists and toppieces.....	$\frac{1}{2}$
Bordered.....	2 $\frac{1}{2}$	Top ironing all round toppieces—	
Bunking.....	3	By hand.....	$\frac{1}{2}$
By machine, bordered.....	1	By machine.....	$\frac{1}{2}$
All round—		Top ironing front of toppieces by hand.....	$\frac{1}{2}$
By hand—		Top ironing back of toppieces by hand.....	1
Bordered.....	6	Polishing by cloth after machine edges and heels only, by hand.....	2 $\frac{1}{2}$
Bunking.....	7	Samples and specials to be reckoned 9 pairs to the dozen.	
By machine, bordered.....	2 $\frac{1}{2}$	Women's work, sew rounds:	
Putting color on:		Edge paring—	
Bevels, other than black work.....	2	By hand.....	1
Buffing paint off bevels.....	1	By machine.....	$\frac{1}{2}$
Sandpapering bevels ready for coloring.....	1	Edge setting—	
Top ironing bevels, other than black work.....	3	By hand.....	4
Getting off:		By machine.....	3 $\frac{1}{2}$
Cleaning paint off front of heels.....	$\frac{1}{2}$	Edges to be inked by workmen.	
Gumming and polishing front of heels.....	$\frac{1}{2}$	Sew round work not faked. Samples and specials to be reckoned 9 pairs to the dozen.	
Filling up holes in heels.....	1		
Filling defective channels.....	$\frac{1}{2}$		
Renovating strips (touching up strips with hot, dull knife, and faking sides).....	1		
Crowing once across waists.....	$\frac{1}{2}$		
Faking edges.....	$\frac{1}{2}$		
Polishing and brushing by machine.....	$\frac{1}{2}$		
Polishing by hand, after machine.....	$\frac{1}{2}$		
Polishing by hand, without machine.....	2 $\frac{1}{2}$		
Cleaning patent vamps.....	1		
Cleaning patent galoshes only.....	1		
Cleaning patent caps.....	$\frac{1}{2}$		
Cleaning patent, all round.....	2		

Men's work, sew rounds: To count as women's ordinary work. Single peaked strips 6 pence per dozen. Samples and specials to be reckoned 9 pairs to the dozen.

Women's work, cashmere and ward shoes: 15 pairs to count as 1 dozen of women's ordinary work. Heels over $\frac{1}{2}$ inch and up to $1\frac{1}{2}$ inches high, extra to parer, $\frac{1}{2}$ pence; heels over $\frac{1}{2}$ inch and up to $1\frac{1}{2}$ inches high, extra to scourer, $\frac{1}{2}$ pence; heels over $\frac{1}{2}$ inch and up to $1\frac{1}{2}$ inches high, extra to padder, $\frac{1}{2}$ pence.

Definition of ward shoe: One bar or spring front, leather or rubber toppiece. Samples and specials to be reckoned 9 pairs to the dozen.

Women's work, felt boots: Buttoned and balmorals, 15 pairs to count as 1 dozen of women's ordinary work. Samples and specials to be reckoned 9 pairs to the dozen.

Girl's work, classification of material: Best—calf patent, calf split patent, box calf, black and colored glacé, white hair calf, mock buckskin, best calf (black and colored), best calf kid. Common—glove

hide, levant goat, box hide, persians, brown bellies, levant kip, common calf kid, patent tipping, enameled shoulders.

Priees: Best class, 7-10, 15 pairs to count as 1 dozen of women's ordinary work; 11-1, 14 pairs to count as 1 dozen of women's ordinary work.

Common class, 7-10, 16 pairs to count as 1 dozen of women's ordinary work; 11-1, 15 pairs to count as 1 dozen of women's ordinary work. Samples and specials to be reckoned 9 pairs to the dozen.

Boys' work: 2-5, 10 pairs to count as 1 dozen of women's ordinary work; 7-10, 14 pairs to count as 1 dozen of women's ordinary work; 11-1, 12 pairs to count as 1 dozen of women's ordinary work. Samples and specials to be reckoned 9 pairs to the dozen.

CANVAS WORK, MEN'S, WOMEN'S, BOYS', AND GIRLS.

Classification.	Per dozen.	Classification.	Per dozen.
	<i>Pence.</i>		<i>Pence.</i>
Putting in lasts.....	$\frac{1}{2}$	Padding black toppieces.....	$\frac{1}{2}$
Heel paring and randing.....	$\frac{1}{2}$	Gumming bottoms.....	$\frac{1}{2}$
Plowing out, all round.....	1	Painting through, one color.....	1
Forepart paring, waists, seats, and all round.....	$\frac{1}{2}$	Brushing bottoms by machine.....	$\frac{1}{2}$
Heel scouring, rough and fine (heels not to exceed $1\frac{1}{2}$ inches high).....	1	Top ironing all round.....	$\frac{1}{2}$
Coloring heels, any color.....	$\frac{1}{2}$	Imitation bunking all round on oakaline by hand.....	3
Padding and brushing heels and seat wheeling.....	$\frac{1}{2}$	Imitation bunking all round on oakaline by machine.....	2
Cutting down corners of heels.....	$\frac{1}{2}$	Getting off by hand, cleaning paint off front of heels, polishing up heels and edges with rag by hand, and slipping lasts.....	$\frac{1}{2}$
Edge setting and stitch wheeling, rotary machine with wheel.....	$3\frac{1}{2}$	Cleaning paint off front of heels.....	$\frac{1}{2}$
Edge setting, rotary machine without wheel.....	$2\frac{1}{2}$	Rubbing off edges and heels by machine.....	$\frac{1}{2}$
Welts (extra), edges to be colored by workmen.....	1	Polishing edges and heels by hand after machine.....	$\frac{1}{2}$
Scouring bottoms and toppieces.....	$\frac{1}{2}$	Slipping hinged lasts.....	$\frac{1}{2}$
Naumkeaging, fine scouring bottoms, waists, and toppieces.....	$\frac{1}{2}$	Slipping lasts with loose blocks (extra).....	$\frac{1}{2}$
Staining natural bottoms.....	$\frac{1}{2}$	Tying up by machine.....	$\frac{1}{2}$
Inking toppieces.....	$\frac{1}{2}$	Polishing after white bottoms (extra).....	$\frac{1}{2}$

Samples and specials to be reckoned 9 pairs to the dozen.

Children's work, 4-6 (classification of material): Best—calf patent, calf split patent, box calf, black and colored glacé, white hair calf, mock buckskin, best calf (black and colored), best calf kid. Common—glove hide, levant goat, box hide, persians, brown bellies, levant kip, common calf kid, patent tipping, enameled shoulders.

Priees: Best, 16 pairs to count as 1 dozen of women's ordinary work; common, 18 pairs same. Samples and specials to be reckoned 9 pairs to the dozen.

Nursery work (riveted and machine sewed): Definition—A boot or shoe with a single sole, one lift, and toppiece. The sizes, half a size less than 4-6 work and the range 2's to 6's.

Classification.	Per dozen.	Classification.	Per dozen.
	<i>Pence.</i>		<i>Pence.</i>
Putting in lasts by hand.....	4	Painting or staining, two colors.....	$\frac{1}{2}$
Plowing out, heel to heel, by hand.....	$\frac{1}{2}$	Painting or staining black or colored toppieces (extra).....	$\frac{1}{2}$
Plowing out seats by hand (extra).....	$\frac{1}{2}$	Padding black toppieces.....	$\frac{1}{2}$
Paring heels only by hand.....	1	Cleaning rivets, foreparts, and waists.....	1
Paring heels only by machine.....	$\frac{1}{2}$	Cleaning rivets and toppieces.....	$\frac{1}{2}$
Paring all round, including heels, and taking out seats by hand.....	$2\frac{1}{2}$	Faking bottoms and toppieces.....	$\frac{1}{2}$
Paring all round, including heels, and taking out seats by machine.....	$\frac{1}{2}$	Gumming bottoms and toppieces.....	$\frac{1}{2}$
Paring foreparts and waist by hand.....	$\frac{1}{2}$	Brushing bottoms and toppieces.....	$\frac{1}{2}$
Paring foreparts and waists by machine.....	1	Top ironing, heel to heel, by self-feeding machine.....	$\frac{1}{2}$
Cutting off heel fronts.....	$\frac{1}{2}$	Top ironing, heel to heel, and putting on color by hand.....	$\frac{1}{2}$
Heel and edge setting operations combined of foreparts and stitch wheel, heel set and seat wheel, 1 machine.....	4	Top ironing all round, including toppieces, by machine.....	$\frac{1}{2}$
Heel and edge setting operations without stitch wheel or seat wheel.....	$3\frac{1}{2}$	Top ironing all round, including toppieces, and putting on color by hand.....	$\frac{1}{2}$
Stitch wheeling, foreparts only, by hand.....	1	Cleaning fake and ink off patent.....	$\frac{1}{2}$
Seat wheeling by machine.....	$\frac{1}{2}$	Crowing across.....	$\frac{1}{2}$
Scouring bottoms and toppieces.....	$\frac{1}{2}$	Getting off, polishing edges and heels by hand, and slipping lasts.....	$\frac{1}{2}$
Naumkeaging bottoms and toppieces.....	$\frac{1}{2}$	Tying up by hand.....	$\frac{1}{2}$
Marking across with dull knife.....	$\frac{1}{2}$	Tying up by machine.....	$\frac{1}{2}$
Painting or staining, one color.....	1		

* Edges to be colored by workmen.

Samples and specials to be reckoned 9 pairs to the dozen.

FRANCE.

SUPERIOR QUALITY OF FRENCH FOOTWEAR.

After England and Germany, France is our strongest competitor in the manufacture of boots and shoes. Distinguished for the good taste and good quality of her manufactures generally, she produces perhaps the finest footwear of any European country, notwithstanding which the American shoe is well known and constantly growing in popularity throughout the Republic. The factories of the country number about 1,200 and are situated principally in Paris, Lyon, Limoges, Marseille, Nancy, and throughout the southern departments. These factories are in most instances small, but well equipped with modern shoemaking machinery, and in many instances where this modern equipment does not exist there are apparent movements on foot for its introduction. The factories being small their output ranks accordingly, that of the largest, I am informed, not exceeding 5,000 pairs per day, while the average output of all factories throughout the country would not exceed 400 pairs per day each.

The machine-made shoes are the Goodyear and Blake sewn. In many of the factories hand-sewn work is still carried on in connection with the machine work. All grades of shoes are manufactured, from a grade retailing from 9 francs 50 centimes (\$1.83) or 10 francs 50 centimes (\$2.03) per pair to one retailing for 35 francs (\$6.76) per pair in machine made; while in hand-sewed work the shoes are sold as high as 60 francs (\$11.58) per pair. The average price, however, is from 15 francs (\$2.90) to 18 francs (\$3.47) per pair.

The French shoe is long and narrow in shape with very high vamp, a style which does not perhaps appeal to the idea of the American manufacturer for either elegance or comfort. I am informed that the French manufacturers are growing more and more inclined to adopt American shapes, and in fact are imitating the American shoe in every detail possible.

IMITATIONS OF AMERICAN SHOES.

The following instance of imitation of American shoes came under the observation of the writer: After some difficulty, for the French do not readily open the doors of their industries to foreign inquirers, admission was gained to a French factory in Paris. The resemblance to an American factory is in many ways marked. The factory visited is said to be one of the best in France, though small, its daily production being about 1,000 pairs. A factory of the same size in the United States would be producing at least 4,000 pairs per day, as our method of installing machinery is much more compact, the French manufacturer seemingly wasting a large amount of floor space.

While in conversation with the superintendent a workman approached and handed him a shoe, also a piece of sole leather which had been stained and polished to a color as nearly resembling that of the sole of the shoe as possible. I remarked upon the fine appearance of the shoe, which thereupon was shown me. It may not come as a surprise when I state that the article in question was a shoe of a well-known American manufacturer of highest grade footwear. It was being imitated in every detail, even to the polish on the sole. I found in this factory many shapes of American design as well as those of typical French style.

IMPORTS OF FOOTWEAR FROM THE UNITED STATES.

The imports of boots and shoes from the United States into France for the fiscal years 1904, 1905, and 1906 were as follows:

IMPORTS OF BOOTS AND SHOES INTO FRANCE FROM THE UNITED STATES, 1904-1906.

Year.	Pairs.	Value.
1904.....	30,817	\$87,553
1905.....	21,292	64,723
1906.....	40,220	126,239

The decrease in 1905 is partially attributed to an increase that year in imports from England, which was nearly equal to the decrease in imports from the United States. The figures for 1906, however, show the growing popularity of the American shoe, and sales could be very greatly increased if our manufactures would exhibit the same enterprise that is displayed in Paris by the British, who have a large number of stores, not only in Paris but in other cities of France, in which shoes of English manufacture are sold exclusively. In addition to these exclusively English stores there are business houses throughout Paris where English shoes form a portion of the stock in trade.

It is believed that as soon as American shoe manufacturers are sufficiently desirous of obtaining foreign trade to be willing to invest the required amount of capital in this way, establishing retail stores and conducting them under American management, the volume of the shoe export trade from the United States will largely increase. Among all the manufactures of our great manufacturing country there is probably no other product which could be more successfully and profitably placed on foreign markets than the American shoe. The popularity of the article is manifested in many ways. Even in the more remote towns one finds a pair or two of American shoes used as the center of advertising attraction. A sample pair of shoes of American make, exhibited in a window to draw the trade, frequently develops for the inquiring purchaser a stock within manufactured in a foreign country other than the United States, but by

American machinery. Nevertheless the name in the window has procured for the shopkeeper a customer.

FRENCH METHOD OF MEASUREMENT.

The French method of designating sizes is altogether different from that employed by the American manufacturer, as is shown by the accompanying table of measurements:

ENGLISH INCHES		3		4		5		6	
STANDARD ENGLISH SIZES									
0									
1									
2									
3									
4									
5									
6									

FRENCH SIZES OR "POINTS"		12		13		14		15		16		17		18		19		20		21		22		23	
CENTIMETERS																									
5																									
6																									
7																									
8																									
9																									
10																									
11																									
12																									
13																									
14																									
15																									

7		8		9		10		11		12	
7											
8											
9											
10											
11											
12											
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											

24		25		26		27		28		29		30		31		32		33		34		35		36		37		38		39		40		41		42		43		44		45		
16																																												
17																																												
18																																												
19																																												
20																																												
21																																												
22																																												
23																																												
24																																												
25																																												
26																																												
27																																												
28																																												
29																																												
30																																												

The French manufacturer designs his product on American lines and exhibits the "Forme Americain." The English manufacturer buys our upper leathers, thereby showing his good sense and business foresight, uses a last of American shape, and places his shoe on the foreign market advertised accordingly "American leather," "American form." In thus advertising his product the popularity of our shoes is more strongly proven, while American rights are in no way infringed upon.

AMERICAN SHOE STORE IN PARIS.

A firm of well-known American manufacturers have recently established a large and well-appointed retail store in Paris. It is the only exclusively American shoe store in France established and carried on by the American manufacturer. This firm has been established in Great Britain for seven years, and now has five stores in London, one in Manchester, one in Liverpool, one in Leeds, two in Birmingham, one in Edinburgh, one in Glasgow, and one in Belfast. The testimony of the manager of the Paris store, which is the head depot for continental trade, should be of value to American manufacturers wishing to enter foreign markets, coming as it does from a man of several years' experience in retail shoe stores in different foreign cities. He says:

We owe the success of our business to a sincere and constant effort to meet the special needs and cater to the various tastes of the people in the countries to which we have introduced our goods.

STYLES THAT SELL BEST.

Parisian customers are taking kindly to the American product, and the business, though at present in its infancy, bids fair to meet with the same success in Paris as in London. Shoes are sold by the American firm at the fixed price of 25 and 32 francs (\$4.82 and \$6.17) per pair, respectively, the same prices obtaining for both women's and men's shoes. "Forme Spanish opera," or the Spanish opera last, a long narrow shape with high vamp and Louis XV heel, is most largely used for ladies' footwear, and a button shoe is generally preferred for Parisian trade, although laced boots and a few oxfords are being introduced. Bright and patent kid McKay, bright and patent kid welt, glazed kid and vici bals, buttons, and oxfords, glazed kangaroo bals, buttons, and oxfords are the styles and leathers commanding best sales in women's goods.

In men's footwear lasts of forms typically French in style as well as those of American design are used. The gray gaiter top and tan chrome-ooze top, in buttons, is a fashionable shoe. Patent kid, vici, tan willow, chrome Russia calf (light weight), vici calf, radium calf, and willow calf bals, vici and patent kid button, and vici Blucher

are the leathers and styles employed as the most desirable for men's wear.

American-made shoes are on sale in many French cities, and "Chaussures Americains" are frequently advertised. These are in many cases imitations of our products. Several pairs of men's shoes were exhibited in the window of one retail dealer bearing the following signs surmounted by a small American flag (this method was noted in many retail shoe stores throughout continental Europe as the insignia of advertisements of goods of American make, or purporting to be such): "Forme Roosevelt," "Forme McKinley" (spelled McKimley), "Forme Washington." Personal investigation makes it certain that no American marks were in these models.

AMERICAN TRADE INCREASING.

That the American shoe trade is increasing in the various localities is beyond all doubt, but the development of the export movement is retarded by the fact that the trade is done indirectly. It will be readily understood that shoes reaching southern markets, for instance, through second or third hands, and sent by rail over long distances, are not in a favorable situation to compete in a region where all successful competition is largely a matter of price. It is suggested that the ports of southern France might serve more effectively as distributing centers for this region.

A certain advance may be made if American manufacturers will send personal representatives to France, thus coming into closer relation with trustworthy firms. A more successful status will be gained, however, when our firms open their own retail stores, dispensing American products known to be of genuine American manufacture. Imitation by local manufacturers forms a strong factor in competition. Even though American trade-marks are registered in foreign countries, the laws of some of those countries are not sufficiently strict to prevent infringement upon them. Shoes of several American manufacturers are on sale in many retail shoe stores in Paris, together with goods of domestic and English manufacture. This method of sale naturally is not so advantageous to the American manufacturer as the one already mentioned and advised. The interest taken by a foreign dealer in an American product, especially when handling goods of his own nation's manufacture as well, can not be so great as that shown by the American desirous of establishing a firm footing in the foreign market, and having accomplished this, to constantly push sales of his product.

PRICES AND CUSTOMS DUTIES.

As already stated, the button shoe for both women and men is often found on the French market and is to-day much more largely

produced by the domestic manufacturer than either balm or low cuts. These latter styles are, however, becoming to a degree popular by introduction in American goods, and their manufacture is now being undertaken in France. I am informed by a reliable boot and shoe importer in Paris that if the American manufacturer would make a shoe of good wearing quality to retail here for 22 francs (\$4.24) a suitable market might be found for the same. Shoes of English manufacture retail from 16 francs 50 centimes (\$3.17) to 33 francs (\$6.37).

The duty on American shoes entering France is 2 francs 50 centimes (48 cents) for balm or buttons, 1 franc (19.3 cents) for oxfords or low cuts per pair. This duty applies to both men's and women's footwear, and is levied irrespective of value. The freight charges cost approximately 50 centimes (about 10 cents) per pair from the United States. Goods are generally purchased thirty days, 2 per cent discount; ninety days, net.

The duty upon printed or advertising matter imported into France from the United States is as follows: Printed in black upon unglazed paper, \$19.30 per 220 pounds; the same on calendered paper, \$28.95; printed in black on common cards, \$4.82; the same on calendered cards, \$5.79; printed in colors or gold on common paper, \$48.25; the same on calendered paper \$57.90; printed in colors or gold on common cards, \$14.47; the same on calendered cards, \$15.44.

MARKET FOR FINDINGS.

American upper leathers of the following sorts—glazed kid, box calf, willow calf, splits, buff, and grain—are quite extensively used in French factories. The value of importation of those grades for the year 1905 was \$543,489.

I was informed that factories established for manufacturing solely shoe findings (box toes, counters, welting, etc.), so often found in the United States, are unknown in France. All this work is done as required for consumption of each special factory by the manufacturer of the finished shoe and under the same roof. A market might be afforded in this line to the American manufacturer who would properly introduce his goods and await the development of the trade, which would doubtless be slow at first.

COST OF PRODUCTION.

The cost of production in France, as in England, is much less than in the United States. Production is figured likewise on a different basis.

Wages and piece prices paid vary according to locality, cost of manufacture being greatest in Paris. The annexed table shows the

staff required for a daily production of 300 pairs of Goodyear shoes in a Paris factory (1 franc = 19.3 cents):

COST OF PRODUCING 300 PAIRS OF GOODYEAR SHOES IN A PARIS FACTORY.

Class of labor.	Sur- face, square meters.	Employees.			Cost per dozen pairs.	Wages.	
		Men.	Women.	Youths.		Each.	Total.
					<i>Francs.</i>	<i>Francs.</i>	<i>Francs.</i>
Gemming insoles.....			2		0.35	4.375	8.75
Lasting, pulling over by hand.....	2.80	6			2.00	8.33	50.00
Operators on consolidated.....		2			.75	9.735	18.75
Pulling out the nails, upper trimming, and pounding up.....		1			.30	7.50	7.50
Sewing in welts (Goodyear).....	1.50	2			.60	7.50	15.00
Inseam trimming.....	1.00	1			.30	7.50	7.50
Welt beating.....	1.00			1	.12	3.00	3.00
Filling and shank fixing.....		2			.60	7.50	15.00
Cementing soles.....	1.50	1			.30	7.50	7.50
Laying soles.....	1.50	1			.30	7.50	7.50
Rough rounding and channeling soles.....	2.00	1			.20	5.00	5.00
Channel opening and shank skiving.....	1.50	2			.60	7.50	15.00
Sole stitching (rapid Goodyear).....	3.00	2			.50	6.25	12.50
Channel laying and sole leveling.....	1.50		1		.20	5.00	5.00
Stitch separating.....		1			.25	6.25	6.25
Heel-seat trimming and finishing off shank edge where it meets heel breast.....	1.50	1			.30	7.50	7.50
Heel attaching.....	2.00	1			.30	7.50	7.50
Toppiece slugging and heel seat-nailing.....	3.00	1			.30	7.50	7.50
Heel trimming and breasting.....	2.00	1			.30	7.50	7.50
Heel scouring (sandpaper not included).....	1.50		2		.30	3.75	7.50
Edge trimming.....	1.50	2			.60	7.50	15.00
Edge inking and setting.....	2.00	3			.90	7.50	22.50
Sole buffing.....	1.50		1		.20	5.00	5.00
Sole buffing on Naumkeag.....	1.50		1		.20	5.00	5.00
Finishing soles and heels.....	2.00		3		.60	5.00	15.00
Beading heel seats, etc.....	1.00			1	.15	3.75	3.75
Cleaning up and pulling out last.....		4			1.15	7.18	28.75
Treing.....	4.50	3			.90	7.50	22.50
Total.....	41.30	37	10	2	13.27		331.75

* Cost per pair, 1.1058 francs.

AVERAGE PRICES PAID TO OPERATORS AND WORKMEN FOR THE MANUFACTURE OF GOODYEAR AND BLAKE MADE SHOES AT PARIS.

Item of cost.	Francs.	Item of cost.	Francs.
Rough stuff cutting.....per day.....	7.00	Sole stitching, Goodyear rapid (women), per dozen.....	0.90
Channeling Goodyear soles.....do.....	6-7.00	Sole sewing, Blake, all around forepart, including shank.....per dozen.....	.30
Channeling Blake soles.....do.....	6-7.00	For shank only.....do.....	.20
Sole molding.....do.....	6.00	Channel laying.....do.....	.20
Channel opening for Blake.....do.....	6.00	Beating out and leveling soles.....do.....	.50
Gemming insoles, includes lip turning and laying cloth.....per 100 pairs.....	4.00	Nailing heel seats.....do.....	.10
Cutting or clicking.....per pair.....	.25	Stitch separating by machine.....do.....	.20
Upper fitting.....do.....	.60	Heel stamping.....per 100 pairs.....	.75
Upper stitching.....do.....	.60	Heel attaching.....per dozen.....	.30
Counter skiving.....per day.....	6.00	Toppiece slugging by machine.....do.....	.15
Box-toes skiving.....per day.....	6.00	Heel trimming.....do.....	.15
Pulling over by hand.....per pair.....	0.20-.25	Heel breasting.....do.....	.15
Lasting on consolidated.....per dozen.....	.84	Edge trimming (randing out included), per dozen.....	.70
Welt sewing on Goodyear machine (men).....per dozen.....	.80	Heel scouring.....per dozen.....	.20
Welt sewing on Goodyear machine (women).....per dozen.....	.90		.60
Sole sewing on Blake machine.....do.....	.25		.70
Inseam trimming.....do.....	.40		.80
Welt hammering.....do.....	.10	Inking and edge setting.....do.....	.90
Pounding up by hand after lasting for Goodyear.....per 100 pairs.....	4-5.00		1.00
Filling and fixing shank pieces.....per dozen.....	1.00		1.10
Sole laying, Goodyear.....do.....	.40	Inking and finishing heels and seat wheel- ing.....per dozen.....	.20
Blake sole laying, taper tacker.....do.....	.25	Sole buffing.....do.....	.25
Rounding and channeling on last.....do.....	.50	Shank and sole buffing, by Naumkeag, per dozen.....	.30
Shank skiving on last.....do.....	.15	Sole and shank finishing, including lay- ing colors.....per dozen.....	0.70-.80
Channel opening on last.....do.....	.15	Cleaning up and taking out last.....do.....	1.00
Sole stitching, Goodyear rapid (men), per dozen.....	.80		

COST PRICE, AT PARIS, LABOR INCLUDED, FOR LASTING A PAIR OF SHOES (FRANCS 13) WITH THE CONSOLIDATED LASTING MACHINE (BLAKE SEWN).

Item of cost.	Francs.
Operator on consolidated lasting machine.....	0.035
Pulling over (by hand).....	.15
Filling in and pounding up.....	.08
Sole laying and pulling out last.....	.03
Furniture and preparation of material (tacks, steel strip, counter skiving, sole molding, channel opening).....	.02
Total.....	.315

AVERAGE PRICES PAID TO OPERATORS AND WORKMEN FOR THE MANUFACTURE OF GOODYEAR AND BLAKE MAKE OF SHOES AT NANCY.

Item of cost.	Francs.	Item of cost.	Francs.
Rough-stuff cutting.....per day..	3.50-6.00	Shank skiving on last.....per day..	2.00-2.50
Channeling Goodyear soles.....per doz..	.05	Channel opening on last.....do.....	2.00-2.50
Channeling Blake soles.....do.....	.05	Sole stitching, Goodyear Rapid.....do.....	5.50-6.00
Sole molding.....per day..	3.00	Sole sewing, Blake, according to article and firm.....per doz..	.15-.30
Sole molding (piecework).....per doz..	.03-.04	Channel laying (included in the following operation):	
Channel opening for Blake (in some firms this work is done by the lasters, but in others it is paid).....per doz..	.02-.04	Beating out and leveling the soles, per dozen.....	.25-.50
Gemming insoles.....do.....	.05-.07	Nailing heel seats.....per day..	3.00-3.50
Cutting or clicking, pairs uppers, per dozen.....	2.00	Stitch separating by machine, per day.....	3.00-3.50
Cutting or clicking.....per day..	4.50-6.00	Heel stamping.....per day..	4.00-4.50
Upper fitting.....per doz..	.50	Heel attaching.....do.....	4.00-4.50
Upper stitching.....do.....	2.00-3.50	Heel piecework.....per doz. pairs..	.12
Counter skiving.....do.....	.03	Topplee slugging by machine, per day.....	3.00-4.00
Box-toe skiving.....do.....	.05	Heel trimming.....per day..	4.00-5.00
Pulling over by hand.....per pair..	.05-.10	Heel breasting.....do.....	4.00-5.00
Lasting on consolidated machine, per pair.....	.05-.07	Edge trimming.....do.....	5.00-6.00
Welt sewing on Goodyear machine, per day.....	5.00-6.50	Heel scouring.....do.....	3.00-3.50
Sole sewing on Blake machine, according to article and firm.....per doz..	.15-.30	Inking and edge setting (some firms pay per dozen \$0.50), per day.....	4.50-5.00
Inseam trimming.....per day..	3.00-3.50	Inking and finishing heels and seat wheeling.....per day..	3.00-4.50
Welt hammering.....do.....	3.00-3.50	Sole buffing.....do.....	2.00-3.50
Pounding up by hand after lasting, for Goodyear.....per day..	3.00-4.50	Sole buffing, piecework, pairs, per dozen.....	.10
Filling and fixing shank pieces, per dozen.....	.60-.75	Shank and sole buffing by Naumkeag, same as for sole buffing.	
Sole laying, Goodyear.....per day..	5.00-6.00	Sole and shank finishing, including laying the colors.....per day..	2.50-4.50
Blake sole laying by taper tacker, operator paying out of this amount the tack strip and taking out the lasts.....per doz..	.03-.07	Cleaning up and taking out the last according to the ability, per day..	2.00-3.50
Rounding and channeling on last, rpe day.....	5.00-6.00		

* About.

AVERAGE PRICES PAID TO OPERATORS FOR THE MANUFACTURE OF GOODYEAR SHOES AT LIMOGES.

Item of cost.	Francs.	Item of cost.	Francs.
Pulling over.....per 100 pairs..	15.00	Heel trimming.....per doz..	0.25
Operator on consolidated lasting machine:		Edge and shank trimming.....do.....	.40
Ordinary work.....per 100 pairs..	5.00	Heel scouring, sandpaper included.....do.....	.20
Patent leather and horsehide.....do.....	6.00	Stitch separating.....do.....	.25
Pulling out nails, etc.....do.....	.25	Edge finishing:	
Welt sewing, Goodyear.....do.....	3.00	Men.....do.....	1.00
Inseam trimming.....per doz..	.20	Women.....do.....	.75
Filling in.....per 100 pairs..	5.00	Sole and top-piece buffing.....per 100 pairs..	2.50
Welt beating.....do.....	.50	Sole stitching, Goodyear Rapid:	
Putting on cement and sole laying.....do.....	2.50	Men.....do.....	4.00
Tough rounding and channeling and shank skiving.....per 100 pairs..	2.80	Women.....do.....	3.50
Channel opening.....do.....	.75	Nailing heel seats.....do.....	.75
Heel-seat trimming.....do.....	.75	Heel attaching.....do.....	2.00
Sole leveling on twin leveler.....do.....	3.00	Slugging top pieces:	
Plowing out heel seat before trimming, per 100 pairs.....	1.00	Men.....do.....	1.50
		Women.....do.....	1.00

**AVERAGE PRICES PAID THROUGHOUT FRANCE TO OPERATORS AND SHOEMAKERS
FOR MAKING GOODYEAR AND BLAKE SEWN BOOTS AND SHOES.**

Item of cost.	Francs.	Item of cost.	Francs.
Rough stuff cutting.....per day..	6.00	Rounding and channeling on last, per	
Channeling Goodyear soles.....do..	6.00	dozen.....	0.40
Channeling Blake soles.....do..	6.00	Shank skiving on last.....per dozen..	.15
Sole molding.....do..	4.00	Channel opening on last.....do..	.15
Channel opening for Blake.....do..	4.00	Sole stitching Goodyear Rapid.....do..	.60
Gemming insoles, including lip turning		Sole sewing Blake, all around forepart,	
and laying cloth.....per 100 pairs..	4.00	including shank.....per dozen..	.30
Cutting or clicking.....per pair..	.25	Sewing shank only.....do..	.20
Upper fitting and stitching.....do..	.60	Channel laying.....do..	.20
Counter skiving.....per day..	5.00	Channel closing and leveling soles.....do..	.30
Box-toes skiving.....do..	5.00	Nailing heel seats.....do..	.20
Pulling over by hand.....per pair..	.15	Switch separating by machine.....do..	.20
Lasting on consolidated—		Heel stamping.....per 100 pairs..	.60
Welt.....per 12 pairs..	.75	Heel attaching.....per dozen..	.25
Blake.....do..	.60	Toppiece slugging by machine.....do..	.15
Welt sewing on Goodyear machine, per		Heel trimming.....do..	.15
dozen.....	.75	Heel breasting.....do..	.15
Sole sewing on Blake machine, per		Edge trimming.....do..	.60
dozen.....	.25	Heel scouring.....do..	.20
Inseam trimming.....per dozen..	.30	Inking and edge setting.....do..	.60
Welt hammering.....do..	.10	Inking and finishing heels and seat wheel-	
Pounding up by hand after lasting, per		ing.....per dozen..	.20
100 pairs.....	4.00	Sole buffing.....do..	.25
Trimming and fixing shank pieces, per		Shank buffing by Naumkeag.....do..	.15
dozen.....	1.00	Sole and shank finishing, including lay-	
Sole-laying Goodyear.....per dozen..	.30	ing colors.....per dozen..	0.80-.90
Blake sole-laying taper tacker.....do..	.20	Cleaning up and taking out last.....do..	1.00

GERMANY.

FACTORIES AND METHODS OF OPERATION.

German manufacturers have the advantages of technical skill and great success in introducing their various products upon foreign markets. Statistics prove, however, that the American shoe is finding a constantly increasing sale in German markets, and local dealers agree as to its popularity with the purchasing public.

Of establishments registered as shoe factories and employed in the manufacture of shoes there are in Germany about 1,400. A large majority of these would, however, not be recognized as shoe factories from the American point of view. Many of them are only small shoe shops, where manufacturing is conducted wholly by hand, or concerns from which material is given out to hand workmen, who complete the shoes in their own homes. Many of these establishments might also perhaps be better described as little cobbling shops. Of factories fitted up with machinery there are about 600, but it must not be inferred that all of these factories have anything like a full equipment of machinery, much less that their machinery should be regarded as constituting a modern plant. The factories would be included in this number which have, perhaps, a press and a pair of leather rollers and a sole-sewing machine. Of factories fitted up for the manufacture of welt shoes there are between 150 and 200, some of which operate on a small scale.

The shoe factories are scattered throughout the country, there being very few centers containing any large number of factories.

The principal groups are at Pirmasens, Weissenfels, Tuttlingen, and Erfurt. The average output per day for the whole of the 600 factories mentioned would not exceed 125 pairs each, owing to the large proportion of small establishments. The largest output per day for any individual factory is one at Nuremberg, which is probably the largest in Germany, the output during 1906 having been 10,000 pairs per day. All grades of shoes are manufactured, ranging in retail prices as follows: Men's, 95 cents to \$2.85; women's, 89 cents to \$2.38; children's, 65 cents to \$1.31 per pair in machine made. In hand-sewn work the retail prices are: Men's, \$2.50 to \$5.25; women's, \$2.26 to \$4.28; children's \$1.77 to \$2.38 per pair.

USE OF AMERICAN SHAPES AND LEATHER.

The characteristic German shape of shoe is broad and, from an American standpoint, clumsy in appearance. American shapes are being introduced, but as yet only to a limited extent and in a modified form, being confined to welt shoes, which form a comparatively small proportion of the total production, and to a very few fine McKay shoes. The principal leathers employed by the German manufacturer are kips, vici kid, box calf, horsehide, and splits. German importations of leather from the United States for the fiscal years 1904, 1905, and 1906 were as follows:

IMPORTS OF LEATHER INTO GERMANY FROM THE UNITED STATES, 1904-1906.

Kind.	1904.	1905.	1906.
Sole.....	\$2, 145	\$8, 506	\$4, 834
Glazed kid.....	75, 563	85, 591	72, 697
Patent or enameled.....	809	390
Splits, buff, grain, and all other upper.....	719, 118	994, 494	1, 539, 732
All other.....	28, 265	42, 390	75, 561

The importation of boots and shoes from the United States during the same years were: In 1904, 166,606 pairs, valued at \$352,619; in 1905, 137,229 pairs, valued at \$327,784, and in 1906, 227,565 pairs, valued at \$387,025.

A retail store has been established at Berlin where American goods are exclusively handled. This store is attractive in appointment, thoroughly up-to-date, and well stocked. I was assured that the business yielded satisfactory returns, that the goods are well liked, and that sales of the same are constantly increasing. Box calf and vici kid are at present the best selling leathers for both men's and women's footwear, these varying in price from \$4.96 to \$6.82 in each instance. American shoes are also on sale in many retail shoe stores throughout Germany, together with goods of domestic manufacture.

COST OF PRODUCTION.

The following is the average cost of manufacture of McKay, pegged, and Goodyear work in Austria and Germany (100 pfennigs=1 mark=23.8 cents):

McKAY AND PEGGED WORK.

Item of cost.	Cost per dozen pairs.		
	Men's.	Women's.	Children's.
	Pfennigs.	Pfennigs.	Pfennigs.
Assembling lasts.....	5- 6	5- 6	5- 6
Tacking on insoles.....	5- 6	5- 6	5- 6
Pasting in counters and toe tips.....	24- 30	24- 30	20- 24
Fastening the upper on the heel seat.....	9- 12	9- 9	6- 8
Pulling over with machine.....	10- 12	10- 12	5- 10
Royalty for pulling-over machine.....	12- 15	12- 15	10- 12
Lasting by consolidated laster.....	30- 36	24- 30	18- 24
Royalty for consolidated laster.....	22- 24	20- 24	16- 20
Trimming toe tips.....	4- 5	4- 5	3- 4
Pounding up by machine.....	8- 10	8- 10	6- 9
Filling up bottoms, tacking on shank by machine.....	4- 6	4- 6	3- 4
Welt tacking with welt tacker.....	6- 12	6- 12	4- 8
Sole molding and channel opening.....	12- 14	10- 12	8- 10
Sole tacking and heel-seat nailing.....	15- 20	15- 20	10- 15
Pounding up heel seat and last pulling.....	16- 20	16- 20	12- 16
Sewing with McKay sewing machine.....	18- 24	14- 18	12- 12
Pegging with Davey pegging machine.....	14- 18	14- 18	12- 12
Pegging with other machines.....	32- 36	28- 36	24- 24
Channel cementing, closing, and leveling.....	24- 30	22- 26	16- 22
Tacking on welt on the top of heel.....	3- 4	3- 4	3- 3
Assembling heel pieces, pasting and compressing by machine.....	12- 16	18- 24	12- 12
Heel attaching and filling up with nails.....	14- 18	16- 24	9- 12
Slugging top lift with universal slugger.....	6- 9	6- 6	5- 5
Heel trimming and scouring.....	9- 12	9- 12	6- 9
Heel breasting.....	6- 9	6- 9	6- 6
Welt and edge trimming for smooth edge.....	16- 22	16- 18	12- 14
Relasting.....	12- 12	12- 12	10- 10
Scouring heel breast.....	6- 8	6- 10	4- 4
Heel scouring and buffing.....	12- 22	18- 30	12- 16
Blackening and edge polishing for smooth edge.....	28- 32	24- 28	18- 22
Scouring bottom and top lift.....	12- 16	12- 14	8- 12
Buffing bottom and top lift.....	15- 20	12- 18	10- 12
Blackening heel and polishing.....	10- 14	10- 18	8- 10
Blackening shank and polishing.....	10- 12	10- 12	
Staining half of the bottom with oakalene and brushing.....	12- 14	10- 12	
Setting edge by machine, McKay work.....	9- 9	9- 9	6- 6
Wheeling by hand.....	12- 15	10- 12	9- 9
Pasting in insoles.....	9- 12	9- 12	6- 9
Finishing, rubbing off wax, and last pulling.....	24- 30	20- 26	18- 22
Pegging up shoes (after cleaning).....	16- 18	16- 18	12- 16
Total.....	477-606 \$1.14-\$1.44	460-589 \$1.05-\$1.40	337-417 \$0.82-\$1.00

GOODYEAR WORK.

Item of cost.	Cost per pair.	Item of cost.	Cost per pair.
<i>Turn work with leather heel.</i>	Pfennigs.	<i>Turn work with leather heel—Cont'd.</i>	Pfennigs.
Channeling insoles to the heel seat, shank skiving, and folding edges ^a	1½	Skiving shanks and heel edges.....	1
Pulling over, pasting counters, common work ^b	4½	Heel trimming.....	1
Lasting by machine.....	2	Cutting of heel breast.....	1
Royalty for lasting machine.....	1	Heel scouring and heel-breast buffing.....	2½
Turn sewing.....	1½	Blackening heels and polishing.....	2½
Royalty for turn-sewing machine.....	3	Polishing edges.....	3
Pulling tacks, trimming, and relasting.....	2	Buffing bottoms and top lifts.....	2
Turning and pasting in heel-seat lining.....	3	Bottom staining and brushing.....	1½
Pasting leather insoles and skiving.....	2½	Tacks, thread, wax, needles, power, light, repairing, etc.....	5½
Putting insoles or shanks, lasting heel seat, etc., finished to the heel.....	12	Wheeling heel seat.....	1
Heel attaching by machine.....	1½	Putting in lining insoles.....	1
Slugging top lifts.....	1	Rubbing down wax and relasting.....	1½
		Total (13.8 cents).....	58

^a One-half pfennig additional for channeling all round.

^b Better work, with toe tips, 6 pfennigs; patent leather, 1 pfennig more.

GOODYEAR WORK—Continued.

Item of cost.	Cost per pair.	Item of cost.	Cost per pair.
<i>Turn work with wooden heel.</i>		<i>Well work (men's and women's shoes)—Continued.</i>	
Channeling insoles, shank skiving, and folding edges	2	Making gem insoles	2½
Pulling over, pasting counters, common work ^a	4½	Assembling last and uppers, tacking on insoles	1½
Lasting by machine	2	Pasting counters and tips, tacking on uppers on heel seat	2½
Royalty for lasting machine	1	Pulling over with machine	1½
Turn sewing	1½	Lasting shanks and drawing up linings	1½
Royalty for turn-sewing machine	3	Lasting by consolidated laster	2½
Pulling tacks, trimming, and relasting	2	Royalty for pulling-over and lasting machines	3½
Turning and pasting in heel-seat lining	3	Founding up, trimming gem insoles	3
Pasting pasteboard insoles and skiving	2½	Pulling tacks and tacking on uppers with small tacks	1
Putting in insoles or shanks, relasting, fixing lining, and finishing to the heel	12	Well sewing	2½
Fixing heel, last pulling, heel attaching, and relasting	6	Royalty for well sewing	8
Edge trimming	1½	Inseam trimming, well beating, bottom filling, and putting in shank piece	6
Blackening edges and top lifts and polishing	3	Sole-cementing and laying-by machine	2
Buffing bottom and top lift	1½	Sole trimming	2
Bottom staining and brushing	1½	Shank skiving and channel opening	1½
Rubbing of wax and last pulling	1½	Fair stitching	2½
Tacks, thread, wax, needles, power, light, repairing, etc.	5½	Royalty for fair-stitching machine	8
Total (13 cents)	55	Cementing and closing channels	1½
<i>Turn work with Countess heel.</i>		Leveling and rubbing down edge of soles	1½
Channeling soles, splitting heel seats, skiving shanks, and folding edges	2½	Nailing and trimming heel seats (loose nailer)	1½
Pulling over and pasting counters ^b	6	Attaching heels (lightning machine)	1½
Lasting by machine	2	Royalty for the complete set of heeling machines	1½
Royalty for lasting machine	1	Slugging top lifts (slugging machine)	1
Turn sewing	1	Heel trimming (McKay heel trimmer)	1
Royalty for turn-sewing machine	3	Heel breasting (Power heel breaster)	1
Pulling tacks, trimming, and relasting	2	Scouring heel breast	1
Turning, fixing heel seat, lining, and pasting	3	Heel scouring	2½
Pasting pasteboard insoles and skiving	2½	Edge and shank trimming	3½
Putting in insoles or shank pieces, relasting, fixing linings, etc., finished to the heel	12	Edge setting	3½
Fixing heel, pasting on heel breast, slugging top lift, and trimming	30	Stitch separating with machine (twice)	2½
Blackening heels and polishing	2½	Bottom and top lifts, scouring	1½
Heel scouring	1½	Blackening heels, polishing heels and shanks, seat wheeling	3½
Polishing edges and top lift	3	Buffing bottoms and top lifts	1½
Bottom and top lift buffing	2	Finishing bottoms	1
Staining bottoms and brushing of	1½	Brushing bottoms and polishing	2
Rubbing down wax and relasting	1½	Separating bottoms and shanks	1
Putting in lining insole	1	Bottom wheeling by hand	1
Tacks, thread, wax, needles, power, light, repairing, etc.	5½	Coloring edges	1
Total (20.4 cents)	84½	Burning edges	1
<i>Well work (men's and women's shoes).</i>		Polishing slugged top lifts	1
Channeling insoles	1	Rubbing down the wax	1½
Channeling insoles (leather)	1½	Relasting	1
		Stamping	1
		Putting in heel-seat piece	1
		Cleaning shoes, treeling, and packing up (box calf) ^d	3
		Total (21.9 cents)	92½

^a Better work, with counters and toe tips, 6 pfennigs; pasting patent leather, 1 pfennig more.^b Patent leather, 1 pfennig more.^c Leather insoles, 3½ pfennigs.^d Chevreux, 4 pfennigs.

AUSTRIA-HUNGARY.

PROGRESS IN MANUFACTURE FOR HOME MARKET.

The dual monarchy is striving hard to manufacture the necessary products for domestic use and so far as possible restrict importations of such articles. To this end trade schools have been established where, among others, the science of shoemaking is taught. The

Austrian workman consequently is often efficient and skillful, and while our shoe export trade to the country is increasing with great rapidity, it behooves the American manufacturer to realize Austrian domestic industrial conditions that he relax no effort from over-confidence.

The industry of shoemaking is one of growing importance in Austria-Hungary, the factories of the dual monarchy numbering 532, situated principally in Austria proper and Bohemia. Only a small proportion of these factories are fully equipped with modern shoe-making machinery, although such equipment is being gradually accomplished. About 60,000 pairs of shoes are daily manufactured, the largest output of any single establishment being that of Turul Schuhfab Temesvar, where the daily production is 2,000 pairs and 500 workmen are employed. The total number of persons employed in the shoe industry throughout the country is estimated at 80,000, while the average output of all factories with modern equipment is about 380 pairs per day each. Of the total daily manufacture, 30,000 pairs are shoes of the cheaper quality, nailed shoes and slippers, 20,000 pairs are pegged shoes of better quality, and 10,000 pairs are welt and turned shoes. A large amount of hand-sewn work is still done, although the retail dealer obtains a higher price for the machine-made than for the hand-sewn product, the former selling at from \$4.06 to \$6.09 the pair in both men's and women's goods for better grades.

The American shape is the favored form, and patent leather, vici kid, and box calf the principal leathers used in the manufacture of men's footwear. For women's shoes a last of French design is generally employed and a light tan vici kid is much favored for fine goods; also patent kid and box calf. In detail of workmanship the Austrian-made shoe stands high, resembling in finish the fine French product. This is especially true of women's fancy oxfords and slippers. Men's goods are manufactured as nearly as may be along American lines, and a good imitation of the American shoe is usually turned out. Austrian manufacturers, striving to reduce importation from other countries and increase their own export trade, have realized the popularity and merit of the American shoe, and are as a consequence manufacturing accordingly.

IMPORTS OF AMERICAN GOODS—TARIFF RATES.

The importation of boots and shoes from the United States into Austria-Hungary for the fiscal year 1904 was 6,991 pairs, valued at \$16,458; 8,880 pairs, at \$21,423, in 1905, and 20,277 pairs, at \$42,094, in 1906. These figures are conclusive proof of the shoe market which Austria-Hungary affords our manufacturers and will continue to afford if the same be conscientiously followed up.

Attractive exhibits of genuine American footwear are found in the leading cities of Austria and Bohemia. Retail dealers agree in testifying to the popularity of the American shoe which obtains in their several localities, and report ready and increasing sales. The same dealers also maintain that there is a splendid possibility of building up a much larger trade if a shoe of satisfactory wearing qualities could be laid down in Austria to retail at from \$3 to \$3.50.

The customs duty on boots and shoes entering Austria-Hungary from the United States is per 100 kilos (kilo=1,000 grams=2½ pounds) as follows: When weighing more than 1,200 grams per pair, 70 kronen (krone, 20.3 cents); more than 600 and up to 1,200 grams per pair, 94 kronen; 600 grams or less per pair, 106 kronen. The United States enjoys the conventional rate of tariff on shoes with Austria-Hungary. The Austrian consumption of American leather for the fiscal years 1904, 1905, and 1906 was as follows:

IMPORTS OF LEATHER INTO AUSTRIA-HUNGARY FROM THE UNITED STATES,
1904-1906.

Kind.	1904.	1905.	1906.
Sole.....	\$14,376	\$8,060	\$12,116
Glazed kid.....	2,675	10,439	3,095
Patent or enameled.....		294	100
Splits, buff, and other upper.....	32,428	58,954	108,280
All other.....	1,923	2,165	1,815

These figures by no means represent the total amount of American leathers used in Austrian factories, as much is bought indirectly through German and English houses. The hours of labor in the shoe industry are from 7 a. m. until 6 p. m., with one hour's interval at noon. The cost of manufacture averages about the same in Austria-Hungary as in Germany, and in factories equipped with modern shoemaking machinery is figured on the same basis.

ITALY.

HIGH REPUTATION FOR AMERICAN SHOES.

In relation to the shoe trade of the United States with Italy it should be stated at the outset that a high reputation obtains here generally for American products. The American shoe exporter should take advantage of this fact and without delay employ energetic methods for the introduction of his goods upon Italian markets. Our competitors are very busy and there is no lack of personal representation on their part. This is, therefore, the present great need for the furtherance of our own trade.

The shoe industry of Italy, though comparatively small at the present time, is rapidly gaining in importance under the awakened

industrial conditions of the country. The factories number about 100, and are situated in the following localities and towns: In northern Italy, at Milan, Turin, Vigevano, Busto Arsizio, Varese, Verona, Vercelli, Alessandria, and Felizzano; in central Italy, at Ravenna and Bologna, and in southern Italy, at Sicilia, Naples, Campobasso, and Catania. These factories are small and in many instances not fully equipped with modern shoemaking machinery, though such equipment is gradually being accomplished. One firm in Turin produces about 1,000 pairs of shoes per day (Goodyear welt, McKay, and army shoes), this being the largest output of any factory in Italy. The average output of all Italian factories is about 400 pairs per day each. The machine-made shoes are the Goodyear and Blake, or McKay sewn. About 350 pairs per day of hand welts are produced in two factories in Naples.

MACHINERY AND MATERIALS—TANNING.

Hand-sewed work is also carried on in connection with machine work to a very great extent in southern Italy, and to a certain degree in the northern section of the country. With the further introduction of modern shoemaking machinery this class of work will gradually lessen throughout the country, as is already the case in the more advanced north. The principal leathers used in manufacture are, for the better grades of shoes, glazed kid, both black and colors, a good quantity of which is imported from the United States; wax calf, box calf, patent leather, some glazed kid, and horsehide from Germany; and also a smaller quantity of various upper leathers from France and Austria. For the cheaper grades the domestic upper leather is used, and nearly all sole leather is of Italian tanning.

Tanning is carried on extensively (raw hides being imported in large quantities, duty free) principally in small tanneries situated in various districts, from which the leather is sold to leather merchants who again sell it to the shoe manufacturers. The small tanneries are, however, gradually disappearing, to be replaced by progressive establishments with modern equipment. Owing to its geographical situation, Italy produces a larger variety of vegetable tannins than can be found in any country in Europe. Italian official statistics give the number of persons employed in the tanning industry as 13,000. One-third of all the raw hides imported come from Central and South America, and a certain amount is furnished by English possessions in Asia, France, and African countries. The duty on tanned leather is \$5 per quintal (220.46 pounds). Germany furnishes fully one-half the required amount. Fancy upper leathers are in great demand. Owing to the customs duty Italian tanners are striving to produce as large a quantity of these as possible for the domestic market.

The following table shows the amounts and values of sole and upper leathers imported into Italy from the United States for the fiscal years 1904, 1905, and 1906:

IMPORTS OF LEATHER INTO ITALY FROM THE UNITED STATES, 1904-1906.

Kind.	1904.	1905.	1906.
Sole leather.....	\$16,857	\$16,372	\$10,131
Upper, all kinds.....	73,380	68,874	177,066
Total.....	90,237	85,246	188,197

PRICES AND STYLES.

The retail prices of machine-made shoes vary considerably. The best quality of Goodyear welt (men's shoes) of glacé kid or box calf sells from about 19 to 22 lire per pair (\$3.67 to \$4.25), the price varying somewhat according to the locality and situation of the retail shop as well as the quality of the shoe. A McKay sewed shoe (men's) sells proportionately for from 15 to 18 lire (\$2.90 to \$2.47). In hand-sewed work two distinct classes are produced: The superior grade bench-made shoe, which commands a high retail price in the large towns, from 40 to 50 lire (\$7.72 to \$9.65), and an ordinary cobbler's shoe, retailing at about \$1.30. These latter are especially the product of southern Italy, and are usually made from sheepskin, tanned and dressed in imitation of glacé kid, and welted and hand stitched. Of course material and work are of inferior quality, though the general appearance of the finished shoe is not bad.

The characteristic Italian shape is something of a cross between the French and Swiss shapes; not so neat as the French nor so clumsy as the Swiss. In men's shoes especially the American form is being introduced to a very large extent; in fact, I learn that about one-half of the men's shoes manufactured at present throughout Italy are made over the American bulldog-toe last, or a last very similar in shape, and known as the American last. In women's goods a last more after the French fashion is usually employed, and for children's wear sandals are largely manufactured. The latter retail from 50 to 75 cents, the former from \$3 to \$3.50 for better grades.

The manufacturers of northern Italy turn out a shoe of exceptionally good appearance, all things considered, though at its best the product is greatly inferior to the American manufactured shoe, which the Italian, as well as every other continental manufacturer with whom I came in contact, during the course of my investigations, attempts to imitate. I did not find, however, the imitation purporting to be "American" so generally advertised here as is true in some European countries.

The importation of boots and shoes into Italy from the United States for the year 1904 aggregated 3,022 pairs, valued at \$4,797; for 1905, 3,993 pairs, valued at \$6,941; and for 1906, 11,838 pairs, valued at \$22,597. In the same years the importation of rubbers was 26,973 pairs, valued at \$12,508; 67,230 pairs, valued at \$35,327; and 77,386 pairs, valued at \$40,916, respectively. American rubbers sell in Italy for \$1.50 the pair.

I am sure sales of American shoes might be very largely increased if manufacturers would awaken to the opportunity which Italy offers for their unequaled product. The existence of prosperous industrial conditions, not only in the northern but in other sections of Italy, have already shown an attendant effect upon her population.

PRESENCE OF AMERICAN SHOES.

The city of Milan reminds one of an American town in its "push and go-ahead" commercial atmosphere, and as a natural outcome the people demand in their dress articles of good quality and smart appearance. American shoes are sold in many towns throughout Italy, although there is no exclusively American shoe store in the Kingdom. All the important retail shoe stores in Milan and Genoa are established and maintained by Italian shoe manufacturers, and if American goods are handled by these dealers at all it is but natural to expect that sales of the domestic product should always receive more energetic attention than those of a foreign competitor. American shoes are sold in Italy at from \$3.30 to \$5.30 for men's and \$2.60 to \$4.85 for women's. Box calf, glazed kid (button and bals), also russets, are desirable, both in men's and women's footwear, and many oxfords, especially for women's wear, are shown. For the latter the very light shades of tan and gray glazed kid are fashionable, and the windows of the best Italian retail stores invariably make a large showing of women's goods of this description. I noted canvas goods but seldom.

The customs duty on shoes is 19.3 cents per pair. Shipments for northern Italy should be sent via Genoa.

COST OF FINDINGS.

Regarding shoe findings and cost of Italian manufacture, all findings (shanks, counters, heels, inner soles, etc.) are made by the shoe manufacturer at the factory. Under the present conditions I do not think the market affords any opportunity in this line for the American exporter. As modern shoemaking machinery and methods are gradually installed a market might be developed. Owing to the old-fashioned methods by which the cost of production is reckoned in this country—on an altogether different basis and in quite a dif-

ferent manner to the one employed in our own country—it has been impossible to secure an intelligible detailed cost of manufacture. However, I ascertained that the average cost of labor for producing a man's shoe (such as retail in the United States for \$3 or \$3.50), exclusive of the uppers—that is, bottoming, the shoe starting from the lasting—including treeing and packing, amounts to 78 centesimi per pair, about 15 cents.

American goods generally, in so far as such have been introduced to this country, enjoy a very high reputation for quality. Inasmuch as various suggestions toward a further extension of American trade in Italy along certain lines have already been noted, I shall confine myself in closing to a single statement: Personal representation is to-day the present imperative need of American trade extension in Italy.

THE NETHERLANDS.

SMALL PARTICIPATION BY UNITED STATES.

Holland has no large manufacturing interests, is favorably disposed toward American products, and consequently affords markets sufficiently important to invite our attention. The shoe industry of this country, not a large one, is principally contained within the province of Nord Brabant. Here one finds about 25 or 30 factories—machine operating—each factory having an average production of from 1,200 to 1,300 pairs per week. There are probably about three times this number of small establishments, many of which would be considered little more than cobbling shops in America, where handmade shoes are turned out in small quantities.

The Dutch wooden shoe is still largely worn in the small and remote villages, and to a certain extent by the workmen in the larger towns. A machine-manufactured shoe of Dutch origin is sold by retailers at prices varying from \$1.60 upward. The product is somewhat crude when compared with an American shoe, lacking in style and finish. The handmade Dutch footwear of high grade, commendable both for its good appearance and careful workmanship, may be bought at varying prices from \$2.40. Wooden shoes command from 20 to 30 cents the pair, prices in all instances applying alike to both men's and women's footwear.

German, English, French, and Belgian goods each hold substantial place in Holland's footwear imports. The United Kingdom exported to Holland, during the year 1906, 22,940 dozen pairs of boots and shoes, at a value of \$187,136, while the amount of our exports for the fiscal year 1906 was only 8,241 pairs, at a value of \$14,680.

An investigation of this market indicates that there is a most encouraging outlook for American-made shoes. The following are

the statistics of our exports of boots and shoes to the Netherlands during the past five fiscal years.

EXPORTS OF BOOTS AND SHOES FROM THE UNITED STATES TO THE NETHERLANDS,
1902-1906.

Year.	Pairs.	Value.
1902.....	10,511	\$15,901
1903.....	9,237	15,747
1904.....	7,712	12,540
1905.....	6,686	11,330
1906.....	8,241	14,680

According to merchants who carry our goods, the trade might be largely increased if the manufacturers could cooperate more generally with the dealers; slowness in shipping and unwillingness to advance even small amounts for advertising seem causes of general complaint. English and German boots and shoes are sold in stores maintained exclusively and separately for their sale by the manufacturers. We can not hope through native dealers, carrying a stock of domestic and other manufactures as well as American, to compete in this trade with so large a measure of success as the above-mentioned nations.

SUGGESTIONS FOR MANUFACTURERS.

One dealer, conducting three stores in Amsterdam, carries on business in two under the name of "The American Shoe Company." The significant value of the name "American shoe" as a business medium is realized when one ascertains that the stocks carried of German, English, French, and Belgian goods are each larger than that of the American manufacture. In Rotterdam I found a very attractive and thoroughly up-to-date shoe department where American-made shoes are exclusively carried. The firm has also a branch store at The Hague. Although considering the American shoe trade in its infancy throughout Holland, this firm reports very satisfactory returns for the two years during which the American shoe department has been established in their store. The goods are well liked and are found to give good satisfaction as to wearing qualities.

For the information of those who are interested in carrying on a successful Dutch shoe trade the following suggestions may be made: Presuming the manufacturer really desires Holland's market sufficiently to follow up the natural progress of trade, let him cater to the tastes of the people, ship goods promptly, with attention to details of manufacture, give a reasonable time for credit, and be willing to spend a small amount in advertising his goods. These conditions being complied with, the American shoe manufacturer may expect a steady customer and a constantly increasing market in Holland.

I wish to draw attention to the fact that goods shipped to this country must not be packed in cases without advising contents and value, even when sent with no charge, as samples or advertising matter.

BELGIUM.

INVITING MARKET NEGLECTED.

Existing industrial conditions in Belgium are very different from those of the Netherlands. Belgium is preeminently a manufacturing country. The shoe and leather industries are of growing importance and the output of the former, manufactured on American lines and advertised under the name "American," are everywhere noted in the domestic market and form a not unimportant item in her growing export trade. Exports from the United States to Belgium of leather and leather manufactures for the fiscal year 1906 were in detail as follows, comparison being shown with 1902:

EXPORTS OF LEATHER AND ITS MANUFACTURES FROM THE UNITED STATES TO BELGIUM, 1902 AND 1906.

Article.	1902.	1906.	Increase.
Sole leather.....	\$165,094	\$316,903	\$151,809
Kid, glazed.....	25,056	50,800	25,894
Splits, buff, grain, and all other upper.....	504,405	507,060	2,655
All other leather.....	3,887	9,664	5,777
Boots and shoes.....	22,260	53,272	31,012
Harness and saddles.....	293	541	248
All other manufactures.....	9,040	4,227	a4,813
Total.....	730,015	942,597	212,582

aDecrease.

The United Kingdom is a strong competitor in the leather market of this country. Importations of leather from the United Kingdom for the year 1906 were \$1,104,056. In the boot and shoe market Great Britain again is our strongest competitor, the following table showing Belgium's imports of British footwear for the years 1901 to 1905, inclusive:

IMPORTS OF BOOTS AND SHOES INTO BELGIUM FROM GREAT BRITAIN, 1901-1906.

Year.	Dozen pairs.	Value.	Year.	Dozen pairs.	Value.
1901.....	4,688	\$43,619	1904.....	3,921	\$42,826
1902.....	4,653	40,680	1905.....	4,950	66,300
1903.....	3,143	39,027	1906.....	6,904	118,618

The total value of boot and shoe imports for the year 1905 was \$380,000; exports, \$321,000. The import duty is 10 per cent ad valorem on boots and shoes entering Belgium.

REQUIREMENTS OF THE MARKET.

I feel no hesitancy in saying that this country offers a good market for the sale of American foot wear, but must be allowed to make the following qualifications to the statement: Agencies should be established in the principal cities by firms who are anxious to secure the trade. A reasonable amount of money must be expended in advertising. It is certain that American goods are not sufficiently advertised; this is true of practically all articles placed on the foreign market by American manufacturers. The cost of advertising in Belgium is relatively small as compared with some countries; accordingly less reason is afforded for its neglect. Trade conditions should be thoroughly studied. The fulfillment of the desire of the United States to increase her manufactured exports lies largely in the hands of her manufacturers. There must of necessity be a foreign demand for manufactured goods to be met by a supply from some source. The old law of cause and effect obtains ever, and our export trade to this country ought not to lie so largely along the line of raw materials. Well appointed stores should be established, and energetic American representatives speaking the language of the country should, if possible, be placed at the head of such stores.

SALE OF AMERICAN MAKES.

There are many lines of American manufactured articles which for obvious reasons could find no market in Belgium, and there are many others which may be successfully handled here. The American shoe, for instance, is popular in this country, so popular, in fact, that it is imitated by Belgian manufacturers, and the imitations sold throughout the Kingdom and in the Netherlands under terms so misleading as to give the impression that the shoes are of American manufacture. In consequence of this the Belgian dealer is enabled to obtain a price for the shoes from 4 to 5 francs (77 to 97 cents) per pair in advance of what he would be able to do were they advertised as a Belgian product. It is claimed that not more than 10 per cent of the boots and shoes purporting to be American are such.

There are three stores in Antwerp handling American shoes. None of these, however, handle exclusively American-made goods, but all report increasing sales of the American shoe. Practically the same conditions prevail in all the principal towns throughout the Kingdom with the exception of Brussels, where, in April, 1907, an exclusive American shoe store was opened by a well-known Massachusetts shoe manufacturer. In some instances the American shoes are purchased by the Belgian retail dealer through London agencies. I should recommend a personal investigation of the trade by manufacturers desirous of doing a successful business here.

On March 1, 1906, the tax of 20 francs (\$3.86) a year levied on commercial travelers offering their goods in Belgium was abolished. At present commercial travelers of every trade can sell their goods and advertise the commodities of their firms without the payment of this tax.

CLIMATIC CONDITIONS.

I find a complaint is made regarding the quality of sole leather used for this trade. Uppers prove of good wearing quality, but resoling in some cases is necessary after a month's wear. The Belgian stone pavements (sidewalks) and the damp climate of the country are conditions which should be borne in mind by the American manufacturers. The characteristic Belgian shoe is long and narrow in style, but the American shape for men finds favor, owing to its comfortable wearing qualities. The leathers desired are vici kid, box calf, willow calf, roan kid, patent calf, and oil grain.

The best quality Belgian-made shoe sells for about \$6. The same price would obtain for an American-made shoe of equally good quality. Prices range from \$2 up. Women's shoes are best liked made in French style, with high heel, while a light shade of tan kid is very popular for women's and children's wear. Boots are preferred to low cuts, the latter being very little worn.

TANNING AND SHOE INDUSTRIES.

The tanning industry of Belgium is one of considerable importance. Not only do they work the native skins, but they import large quantities annually. Belgium contributes annually to this industry about 800,000 skins, which include ox, horse, buffalo, kid, and sheep skins, and are imported chiefly from Argentine, Uruguay, Brazil, France, Holland, Germany, etc. Australia and South America send in sheepskins tanned as well as fleeces, which are clipped after arrival.

For the past several years chrome has been used for tanning with excellent success. The large hides are tanned with oak bark or the extracts of oak, quebracho, etc. Kid and sheep skins intended for fine work are treated with sumac; those for chamois-leather work are treated with fish oil, while dressed hides are tanned with alum and salt mixed with the yolks of eggs and flour. The materials for fine tanning work are produced in Belgium, such as oak bark and certain extracts. However, most of the materials required are imported. Sole leather is manufactured throughout Belgium, but the leading centers are Stavelot, St. Hubert, Laroche, Namur, Peruwelz, and Soignes. Strap leather is manufactured in Liege, Verviers, Herve, and other places adjoining. Skins for gloves are tanned at various places throughout the Kingdom. About 60 establishments are employed in the dressing and dyeing of skins.

The domestic shoe industry gives employment to about 50,000 workmen, of which number about 4,000 are employed in factories manufacturing a machine-made shoe; these factories number about 55 and are situated principally at Brussels, Verviers, Louvain, Binche, Frameries, Paturages, and Termonde. Hand work is principally carried on in Flanders, at Iseghem and Sotteghem; in the Province of Antwerp, at Lierre; in the Province of Hainaut, at Binche; and in the Province of Liege, at Herve. In fact the handmade shoe is manufactured in every hamlet and village of Belgium by local makers employing one or two hands, and their output is of all sorts—nail soles (also machine made), screwed soles, peg soles, and hand sewed for men, women, and children—the annual production being approximately 2,500,000 pairs.

HOURS OF LABOR.

The hours of labor in Belgium are very long. The laborer commences work at 6 a. m. and ceases work at 7 p. m., with the usual breaks for meals. He is paid, according to the trade in which he is employed, on the average 7 cents to 9 cents per hour for ten hours and for additional two hours 25 per cent increase, making his daily wage from 84 cents to \$1.08 for twelve hours. Children begin their life work at the age of 12 years; and as regards hours for child labor, the law states that no child under 16 years of age shall be kept at work for more than twelve hours a day. A Belgian statistician estimates the average earnings of an artisan at about \$160 per year, which includes child labor.

SWITZERLAND.

PRODUCTS OF LOCAL FACTORIES.

Switzerland is constantly gaining in industrial importance. Although her shoe factories are small in number, she boasts the home of the largest shoe factory in Europe and a rapidly expanding export trade, both of which facts will be noted later. Our own footwear trade with this country offers good possibilities which have hitherto been unrealized by the American manufacturer.

There are 30 factories in Switzerland turning out machine-made shoes, situated chiefly in the northeastern or German-Swiss cantons. Hand-sewed work is produced in small shops throughout the country generally, and the wooden product is manufactured in the cantons of Glarus and Lugano. Of these latter 40,000 pairs are annually sold in the country. The wooden-shoe industry is carried on during the winter months only, as in summer the peasants, who make the shoes, are engaged with their flocks and herds in the mountain pastures. A shoe fashioned of wood, with leather strap across the instep, retails at 1.25 francs (24 cents); a like product, hobnailed, retails at 1.75 francs (34 cents). Wooden shoes with leather tops and felt linings are also among the output. In Canton Tessin a

wooden shoe with military heel is manufactured and largely worn by the native peasantry. This style of shoe sells for 1.75 francs (34 cents), or if so cut that a knot in the wood forms the heel or a portion of the same, thereby giving a more serviceable wearing quality, the price is 2.50 francs (49 cents).

In machine work the annual production is said to reach about 7,500,000 pairs, the average output of the factories being from 300 to 400 pairs per day each. The factory with the largest output in Switzerland is in Schonenburg. In fact this factory is the largest on the continent of Europe, its daily output averaging 9,500 pairs of shoes, and it employs 3,800 persons.

LABOR AND STYLE OF PRODUCT.

The work of Swiss factories is not specialized, as in the United States, and one may find shoes for women, men, and children, also slippers, manufactured under the same roof. These likewise may consist of Goodyear welt, Blake sewed (McKay), peg, and nail products. The Swiss factories are largely equipped with modern American shoe-making machinery, and American leathers are more or less employed in manufacture. In spite of this the Swiss, as compared with the American product, is very inferior in both style and finish, as all labor here is practically unskilled. Women do the work of buffing, scouring, and finishing, as well as stitching and pulling over, and often accomplish far more work than the male workman.

Shoes of all grades are manufactured, the retail prices being from 7.50 to 12.50 francs (\$1.45 to \$2.41) for the more ordinary kinds, while for the best grade Goodyear welt shoes the retail price is 22.51 francs (\$4.34). A laborer's hobnail shoe is sold at from 5 to 10 francs (\$0.96 to \$1.93). Box calf is a favored leather for better grades, and woolen-lined products for winter wear of this leather, men's and women's, cost from 16 to 20 francs (\$3.08 to \$3.86). Top boots are sold for 19 francs (\$3.67). Wax splits are used in the manufacture of the cheaper grades. Tan or colored leathers are not in favor at present.

The characteristic Swiss shoe is short, with broad ball and stub toe, sharply pointed, nonflexible, uncomfortable, and awkward in appearance. American forms are being introduced, but the present Swiss adaptation of the American form produces rather unsatisfactory results, being fashioned so narrow across the ball that a disproportionate height of instep is necessary; consequently after a little wear, the vamp broadens beyond the sole in an unsightly manner.

AMERICAN SHOE MACHINERY—HOURS OF LABOR.

For one factory here, recently enlarged and refitted with American shoemaking machinery, a line of genuine American lasts and pat-

terns have been ordered from a firm in the United States, and "American shoes" (so-called) will in future be manufactured in this factory, together with the characteristic Swiss product. No half sizes are manufactured.

The hours of labor are from ten to twelve, varying in different parts of the country. The factory workman is required during the summer season to begin his labor at 4.30 or 5 a. m. This early hour is demanded in order that the fresh energies of the workers may be obtained by the employer, as nearly all artisans are engaged to a greater or less degree in agriculture for personal benefit. During the winter season work in factories commences at 6 o'clock; fifteen and twenty minute rests are allowed at 9 and 4 o'clock, respectively, when refreshments of beer and bread are taken. From one to one and one-half hours are allowed for dinner.

The principal food of Swiss shoemakers consists of bologna, bread, and cheese, with beer; meat is seldom eaten unless on feast days; soups are served on Sundays.

EXPORTS AND IMPORTS.

The total value of exportation of leathers and shoe goods from Switzerland during the year 1905 was \$1,752,960, the United Kingdom taking \$504,000 worth; Germany, \$277,440; United States, \$3,840; France, \$460,800; Austria, \$24,960; Italy, \$54,720, and other countries, \$408,000. Thus Switzerland is developing a trade in this line with many of the world's markets. A great deal of satisfaction exists among Swiss manufacturers over the fact that a shoe export trade has been established with Germany, the German manufacturers being the chief competitors in the Swiss domestic shoe trade. Switzerland has already extended her foreign shoe trade to Brazil and other South American countries, furnishing for these markets her best grades of footwear.

Switzerland imported from the United States during the year 1905 leather and its manufactures as follows:

IMPORTS OF LEATHER AND ITS MANUFACTURES INTO SWITZERLAND FROM THE UNITED STATES, 1905.

Article.	Value.	Article.	Value.
Boots and shoes.....	\$25,846	Prepared parts.....	\$5,558
Harness, etc.....	3,566	Miscellaneous.....	33,649
Sole leather.....	508,883		
Other kinds of leather.....	861,899	Total.....	1,439,401

[Switzerland, on account of its inland position in Europe, does not receive the bulk of its purchases of American goods direct, but through re-exports of French, German, and Italian ports. Hence the total declared leather goods' exports of the United States to Switzerland for the fiscal year 1906 appeared as only \$41,700, against \$54,259 in 1905. Mr. Butman states, however, that his statistics referred to were obtained from Swiss sources and were supposed to be officially correct.—B. of M.]

In boots and shoes the statistics show the following values of importations from other countries: Germany, \$630,240; France, \$100,800; Austria-Hungary, \$96,000; United Kingdom, \$17,280.

Genuine American-made shoes are on sale in all important Swiss towns, and are constantly increasing in favor. The larger stocks carried by Swiss dealers are of the better grade shoe, selling usually for 22 francs (\$4.25). This market affords capacity for a much larger development. If an earnest effort were made by American shoe manufacturers to further introduce and push sales of the same, there is no reason why a splendid increase of trade should not result.

TAXATIONS FOR AMERICAN STORES—COST OF PRODUCTION.

I should judge that of Swiss cities the town of Geneva afforded the best situation for the establishment of an exclusively American shoe store. Certain it is that at least in one of the large tourist centers such a store ought to do a satisfactory business, both with the native population, who see and admire the footwear worn by the visitors, and also with the tourists. Likewise, if the shoe manufacturers of the United States were represented by commercial travelers, introducing the product in all communities, a good business ought to result throughout the country.

It should be borne in mind by the American manufacturer and exporter that custom duties are levied on the gross weight of all importations, which means weight of the article and its packing, and this at the tariff rate charged for the contents of the package. The United States enjoys the most-favored-nation clause for its products entering Switzerland.

COST AND STAFF REQUIRED FOR A DAILY PRODUCTION OF 250 TO 300 SHOES IN SWITZERLAND WITH UPPERS ALL PREPARED.

GOODYEAR WELT.

Class of labor.	Employees.			Cost per pair.	Salary.	
	Men.	Women.	Boys or girls.		Each.	Total.
Gumming insoles.....		1	1	<i>Francs.</i> 0.30	<i>Francs.</i> 3.50	6.00
Lasting with consolidated.....	2			.25	2.50	
Pulling over by machine.....	1			.04	6.00	12.00
Assembling for pulling over.....			2	.02	6.00	6.00
Pulling out nails, upper trimming, and pounding up, etc.....			1		2.50	5.50
Sewing on welts.....	1				3.00	
Inseam trimming.....	1			.02	4.00	4.00
Wetting beating.....			1	.01½	5.00	5.00
Filling and shank fixing, etc.....			2		3.50	3.50
Cementing soles and sole laying.....	1				3.00	3.00
Nailing heel seats.....	1			.01½	3.00	6.00
Rough rounding and channeling soles.....	1			.01½	4.25	4.25
Shank skiving and channel opening.....	1			.01½	3.50	3.50
Rapid stitching.....	1			.02	6.25	4.25
Channel laying and sole leveling.....	1		1	.01½	3.50	3.50
Stitch separating.....		1		.02	5.00	5.00
				.01½	2.50	4.25
					3.50	
						2.50
						3.50

COST AND STAFF REQUIRED FOR A DAILY PRODUCTION OF 250 TO 300 SHOES IN SWITZERLAND WITH UPPERS ALL PREPARED—Continued.

GOODYEAR WELT—Continued.

Class of labor.	Employees.			Cost per pair.	Salary.	
	Men.	Women.	Boys or girls.		Each.	Total.
Heel-seat trimming.....			1	<i>Francs.</i> 0.01½	<i>Francs.</i> 3.50	<i>Francs.</i> 3.50
Attaching heel and toppiece.....	1			.02	5.00	5.00
Slugging toppiece.....			1	.01½	4.25	4.25
Heel trimming and breasting.....	1			.02	5.00	5.00
Heel scouring.....	1			.01½	4.25	4.25
Heel blacking, setting, beading, and polishing.....		1		.01½	4.25	4.25
Edge trimming.....	1			.02	5.00	5.00
Edge setting and inking.....	1		1	.02	5.00	5.00
Sole buffing.....		1		.01½	3.50	3.50
Naumkeag buffing.....		1		.01½	3.50	3.50
Finishing soles, shanks, and toppiece.....		2		.01½	4.25	8.50
Treering and cleaning, etc.....	2			.01½	4.25	8.50
Pulling last and packing.....			2		3.50	7.00
Total.....	18	7	13			151.50

BLAKE-SEWN (McKAY) STANDARD SCREW.

Bottom stock cutting, etc.....	2		2		5.00	10.00
Channeling McKay soles and opening channels.....			1		3.50	7.00
Sole molding with fittings.....	1				3.50	3.50
Lasting.....	1			0.02	4.50	4.50
Pulling over and attaching soles.....				.02		6.00
Assembling, etc.....			2		2.50	6.00
Upper trimming, pounding up, and drawing lasts.....			2		3.00	5.50
McKay sewed, standard screwed, or pegged.....	1			.01½	4.25	8.50
Leveling soles (closing channel, McKay work).....	1			.01½	4.25	4.25
Attaching heel and top lift.....	1			.02	4.25	4.25
Slugging top lift.....			1	.01½	5.00	5.00
Heel trimming and breasting.....	1			.02	4.25	4.25
Heel scouring.....	1			.01½	4.25	4.25
Heel blacking, beading, and setting.....		1		.01½	4.25	4.25
Edge trimming.....	1			.02	5.00	5.00
Edge inking and setting.....	1			.02	5.00	5.00
Sole buffing.....		1		.00½	3.50	3.50
Naumkeag buffing, McKay sewed.....		1		.01½	3.50	3.50
Hobnailing, standard screw, or peg.....			10		3.00	30.00
Finishing, buttons, shanks, and top lifts on McKay's.....			2	.01½	4.25	8.50
Staining bottoms and shanks and top lifts on standard screw or peg wood.....			2		3.50	7.00
Finishing up, cleaning.....					3.00	6.00
Dressing, packing, etc.....			2		3.50	7.00
Total.....	11	9	20			157.75

CONSULAR REPORTS FROM VARIOUS COUNTRIES.

AUSTRALASIA.

INVITING MARKET FOR AMERICAN SHOES AND SLIPPERS.

Writing from Christchurch, New Zealand, Special Agent Harry R. Burrill directed attention to opportunities presented to American manufacturers of footwear in a report which appeared in the Monthly Consular and Trade Reports for July, 1907. He said:

Throughout Australasia American-made shoes have attained a widespread popularity that is as gratifying as it is warranted by their superior quality, correct shape, neat, natty appearance, and the comfort with which they may be worn. Although, as indicated in a previous report, an inferior shoe, masquerading as the best grade, has been exported to Australia and New Zealand from the United States, the reasons for such transaction are well known to the trade, and the demand has not suffered to any appreciable extent. As a measure of precaution, however, it would be well in the future to have the name of the American maker stamped on as a guaranty of quality, which would make misunderstanding or misrepresentation impossible.

Several manufacturers of the United States have declined to ship second or third grade shoes when requested, on the ground that they could not afford to export an inferior article bearing their name or trade-mark. The wisdom of this refusal has been repeatedly demonstrated, for by maintaining the standard of their output they have retained the confidence of the Australasian consumers. Those manufacturers who shipped lower grade shoes to this market with a distinct understanding that they should be sold as such have suffered, for, according to importers and dealers who are thoroughly in touch with the situation, instances are not infrequent where retail dealers have obtained first-class prices for second-grade goods. An Australasian consumer may be misled once in this way, but it is difficult to again impose on him, and the blame for the whole transaction usually falls on the manufacturer. Among the trade there is no disposition to censure the American manufacturers, but that evidence of confidence will be of small benefit if the demand for these particular makes shows a decline, whatever the cause may be.

MARKET FOR SLIPPERS.

An investigation of the markets of Australasia shows that the manufactures of the United States are not represented in a highly important branch of the trade. In Australia, and more especially in New Zealand, may be found an attractive market for shoes and slip-

pers made of camel's hair, imitation camel's hair, and felt. These goods are imported in large quantities from Austria, Germany, and France, and, according to the Australasian importers, there is no sound reason why the United States should not enter the market. The use of these goods is not by any means limited to the working classes, for their comfort, utility, and comparative low cost appeal to all, whatever may be their financial position.

With a view to placing this opportunity for trade expansion before the manufacturers of the United States, samples of the most popular styles on the Australasian markets, together with descriptions and prices at factory, are forwarded to the Bureau of Manufactures. This assortment, although necessarily incomplete, is sufficiently varied to give our boot and shoe manufacturers a fairly accurate idea of what the market requires in this line of goods, and American ingenuity and enterprise may be depended on to supply as complete a variety of patterns and sizes as are supplied by the continental makers if on investigation the proposition appeals to them. The boot and shoe manufacturers of Australasia have not as yet attempted to make these goods, and it is not regarded as probable that the effort will be made, at least for a considerable length of time. England has tried to compete, but with practically no success. The American manufacturer could therefore enjoy this attractive trade without the handicap of a preferential tariff against him.

PREFERENTIAL RATES AND PRICES.

The Australian preferential trade proposal, which included boots and shoes, is at present a dead letter, because of its conflict with existing treaties, and the New Zealand law gives a preference only to Great Britain and her colonies. Inasmuch as the shoes and slippers under discussion are all imported from the Continent of Europe, they enter these markets under precisely the same conditions as would similar articles manufactured in the United States. It is probable, however, that as a rule the American-made article would have a shade the advantage in freight rates.

The prices shown in the list furnished the Bureau of Manufactures are those charged at the factory, with the trade discounts, which are also indicated. In figuring on the cost of the goods laid down at Australasian ports it would be safe to add 50 per cent, and an additional 20 to 30 per cent will cover their retail price. In the judgment of the importers, dealers, and even the manufacturers of Australasia, this trade opportunity is well worth the careful examination of the manufacturers of the United States; and if it is found that the goods can be made and laid down here at a price that would enable them successfully to compete with those on the market, no time should be lost in making the experiment. It may be asserted with confidence that, quality and price being equal, the Australasian dealers would unhesitatingly declare in favor of the American-made articles as against those of continental make.

LOCAL FACTORIES.

Boot and shoe factories may be found at many of the trade centers of Australasia. They are doing satisfactory work and are building up an excellent business, which is certain to increase through the pro-

tection afforded by the governments of Australia and New Zealand. It is not believed, however, that the expansion in the trade of the colonial-made shoe will result in a proportionate decrease in importation. And this is especially true of the American-made shoes.

The establishment of colonial factories, notwithstanding the possible future effect on exports of boots and shoes from the United States, is of great benefit to another American industry. The colonials are trying to make shoes as near like those manufactured in the United States as is possible, and they believe the best way to accomplish this is to use American machinery in their manufacture. As a consequence colonial factories are to a gratifying extent equipped with the shoe machinery of the United States; and not only this, but everything necessary for properly finishing a pair of shoes is imported from the United States.

Every effort should be made by the American manufacturers to protect and strengthen the boot and shoe trade now so satisfactorily established on the markets of Australasia, and an attack on the monopoly in camel's hair and felt goods now enjoyed by the manufacturers of Continental Europe would, it is believed, be a popular and profitable move in that direction.

BRAZIL.

TRADE IN SHOES AND SHOEMAKING MACHINERY.

(From Monthly Consular and Trade Reports, May, 1907.)

Consul-General G. E. Anderson, of Rio de Janeiro, reports that the boot, shoe, and leather trade of Brazil needs attention from American manufacturers. He reviews the situation thus:

The record of 1906 has not been fully satisfactory to American interests, although there was improvement over other years. The sales growth in American shoes has been steady, while that in American leather has been sporadic. American manufacturers of leather have shown an interest in this field, with the result that they have enjoyed a more satisfactory trade. There has been a great increase in the imports of shoemaking machinery, which measures the development of Brazil's shoemaking industry along modern lines and promises much for American leather if not for American shoes.

Until recently the mass of Brazil's population has used for foot wear the south Europe "tomongas," or several varieties of cheap loose slippers made from a piece of wood, which forms heel, sole, and body, with a top which is little more than a strap of leather, cloth, paper, etc. These slippers are cheap, of little value in cold weather, and indeed would not be accepted anywhere if the people could afford anything else. Until recently it has been impossible to secure better foot wear in Brazil at a price which would bring the goods within the reach of the mass of the people for more than dress occasions. Shoes heretofore have been made in Brazil by the old-time shoemaker by hand, of whatever leather might be had and upon old models. For most of Brazil this is still the case.

BOOT AND SHOE DEVELOPMENTS.

In many instances the small shops have been developed into large factories. There has been some development of the labor-saving idea in these, but the work has been done by hand with indifferent lasts and models. In the meanwhile heavy import duties have shut out foreign goods except for the wealthy, and labor and other troubles have combined to hold back unduly the development of the business. In the past year or two there has been considerable restlessness in the business, and the recurrence of strikes and lockouts among the large number of workmen employed in the shoemaking industries of the country have aided to force a change. In spite of high duties there has been a gradual introduction of American foot wear, and this has led to a change from the long, pointed, thin-soled shoes common to south Europe to the broader and more substantial forms. The result has been a notable change in the business of shoe manufacture and shoe selling. In Sao Paulo the factories have mostly been modernized by American machinery. The change in Rio de Janeiro is also in progress. The entire character of shoe styles now offered the Brazilian public has changed, and the dominance of the American styles is becoming more and more pronounced. There are few places in Brazil where American shoes, especially those for men, are not regarded as the best. There use has been very largely one of price, as the customs and other expenses have kept foreign shoes under disadvantages. The total imports for two years were as follows:

Country.	1904.	1905.	Country.	1904.	1905.
United States	\$31,848	\$64,213	Other countries	\$23,633	\$14,262
Austria-Hungary	67,257	55,980			
France	25,661	20,276	Total	197,657	188,031
Great Britain	49,258	33,900			

[The declared exports of boots and shoes to Brazil from the United States during the past two calendar years were as follows: For 1905, 26,024 pairs, valued at \$63,836, and for 1906, 36,695 pairs, valued at \$96,705.—B. of M.]

An American shoe which retails at home for \$3.50 will retail here at present exchange for \$7.75, yet it is doubtful if the dealer here makes any greater profit than the dealer in the United States. Foot wear to be suited to large consumption in this market must cost less than American goods cost here at the present time. Doubtless the introduction of American machinery will cheapen the cost of shoe manufacture so much that there will be a far more general use of up-to-date foot wear, and the demand for all sorts of shoes will be immensely increased in Brazil in the course of a short time. This demand is already felt. While there has been comparatively slight increase in population of a sort to represent much consuming power, there has been a vast increase in the output of Brazilian shoe factories, which is reflected to a greater or less extent in the increased imports of leathers suitable for shoemaking, and at the same time there has been an increase in the output of Brazilian leathers.

LEATHER IMPORTS.

The Brazilian customs returns give the imports of hides and skins, tanned or otherwise prepared, for two years as follows:

Country.	Kilos.		Value.	
	1904.	1905.	1904.	1905.
United States.....	63,170	61,490	\$126,143	\$135,614
Germany.....	149,357	160,206	577,961	681,781
France.....	287,598	352,680	763,434	969,115
Great Britain.....	89,426	95,894	109,455	142,622
Other countries.....	70,020	61,528	52,353	58,413
Total.....	659,571	731,298	1,629,346	1,982,546

[No sole leather was exported from the United States to Brazil during the past two calendar years. The exports of upper and other leather, including glazed kid, patent or enameled, splits, buff, grain, etc., amounted in 1904 to \$98,957, in 1905 to \$133,846, and in 1906 to \$166,432.—B. of M.]

That American leather men have an especially good opportunity to introduce their leathers now, however, is unquestionably the case. Other memoranda on this subject have been submitted from this consulate-general before. It is only necessary to say, perhaps, that the demand here is for leathers suitable for a tropical climate—leathers which will resist moisture and yet be light in weight, light in colors, and running to the flashy in appearance; the proportion of kid leather of the several varieties and grades is high. The French kid-leather manufacturers have an advantage in the market at present.

A DEMAND FOR SHOES OF A SPECIAL KIND.

The fact that the demand for American-style shoes and for the American goods themselves is increasing and revolutionizing the shoe trade of Brazil does not mean that American manufacturers need to give no special attention to manufacturing for the Brazilian market. There is need of this special attention, both in the matter of quality and weight and in the matter of style itself. That Brazilian taste and Brazilian demand have turned toward American models suggests the advisability of American manufacturers meeting both halfway. In the first place, the weight of shoe wear in a tropical country is to be considered. Brazilians run to kid leathers and light-weight material generally. Shoes with cloth tops are popular. In short, hot-weather goods are wanted. Heavy-weight goods, even of the most approved style and the best of quality, can hardly be popular here, no matter what the price. The same principle applies in the matter of leathers. In style Brazilian taste would probably take best of all to models not so radically foreign as to forget everything Brazilian. The Brazilian factories which employ American machinery and American lasts do not run to heavy toes or widely extended soles.

Most American shoes now sold in Brazil are distributed through local firms as agents of the American manufacturers, generally under a more or less closely-drawn agreement of exclusive territory within

certain limits. Credit terms are generally more liberal than those given dealers in the United States. The pushing of the trade is interfered with considerably by the high duty on advertising material. Newspapers and magazines probably offer the best advertising medium in Brazil at the present time.

CANADA.

TARIFF RATES SERIOUSLY AFFECT AMERICAN SHOE IMPORTS.

(From Monthly Consular and Trade Reports, June, 1907.)

Consul J. E. Jones writes that the sale of American shoes, especially the finer grades, which have long enjoyed an almost exclusive market in Winnipeg and the surrounding country, is seriously affected by the new Canadian tariff. He writes:

Gradually, through unfavorable tariff legislation, the market is being destroyed, and unless remedial legislation is enacted the American-made shoe will disappear from the stores. There will always be a demand among the well to do for the high-grade American dress shoe, but this will become more and more limited until it ceases altogether. Already the cheaper grades of American shoes have been forced out of the market. The Canadian manufacturer has been a successful competitor in this line, offering a value impossible of competition. This has been largely the result of the 25 per cent duty. Under conditions which obtain in some foreign countries it might be possible for American manufacturers to meet the competition. In other words, if a manufacturer were permitted to sell his goods cheaper in Winnipeg than he does in America the situation might be met. But the Canadian customs requires an invoice to show the selling price of similar goods in America and levies the tariff accordingly.

There is an enormous demand for cheap shoes in Winnipeg. Many thousands of immigrants pass through the city on their way west. The city is the doorway through which the new settlers must all pass. Immigrants are not given to a nice discrimination in the selection of shoes. They want substantial, well-made shoes, without regard to style. The Canadian manufacturers seem to have made a special study of this demand and are supplying it. An immigrant does not spend over \$3 for a pair of shoes, and it is next to impossible to get an American shoe to sell at that price.

THE NEW TARIFF A FACTOR.

The last revision of the Canadian tariff has raised the duty on high-grade shoes to 30 per cent ad valorem, and this has had a marked effect upon the market. This duty applies to samples brought into the country. To meet this exigency American manufacturers, especially those who carry large lines, find it more profitable to pay the expenses of a buyer to some point near the boundary where the samples are displayed in American territory. The largest wholesale shoe dealer in Winnipeg, who is also one of the largest in Canada, had this to say upon the subject of American shoes:

The American high-grade shoe in our market is doomed. Through the high tariff and freight rates of the past and the relative high wholesale prices we are compelled to pay, there remained but a small margin for the dealer. Five per cent additional

tariff solves the problem. We can not pay it. All of my agents have been instructed not to push American goods. Either the American manufacturers will have to cut their price, give us a better shoe, or retire from the market. The Canadian government is trying to encourage home industry. Heretofore the Canadian manufacturer has not produced a satisfactory high-grade shoe, but when they see the market and appreciate the demand a better shoe will be produced.

Some years ago an attempt was made to operate a shoe manufactory in Winnipeg, but it was not attended by any degree of success. These attempts, however, were not vigorous, and the scale upon which they were operated quite limited.

ECUADOR.

PROFITABLE BUSINESS ESTABLISHED.

(From Monthly Consular and Trade Reports, July, 1907.)

Consul-General H. R. Dietrich, of Guayaquil, sends the following information concerning the popularity of American shoes in Ecuador:

American shoes are generally better liked here than those imported from other countries, on account of their style, workmanship, and durability. Merchants handling them say they are better sellers than those brought from Europe. An undeniable proof of their growing popularity and well-merited reputation is the yearly increase in sales.

Spain leads in this market in one specialty, however, a child's shoe made of rather cheap material, but which presents a good appearance and can be sold at a low price. The reason for supplying cheap shoes for children is that the masses are poor and must economize on every hand. American manufacturers should be able to furnish as good or even a better shoe for children for as little money as other countries supply. This matter should be given consideration by American manufacturers who desire to extend their trade in Ecuador, particularly for the reason that when a specialty is put on the market and meets a well-established demand it tends to carry with it trade in other lines.

POPULAR REQUIREMENTS.

The demand for cheap goods does not apply to men's and women's shoes. On the contrary, the average customer wants a neat, attractive, well-shaped shoe, with a very high vamp which is also serviceable. One merchant informed me that some time ago he purchased a large quantity of men's low-priced shoes in the United States which, on account of their attractive appearance, found a ready sale at first, but as soon as it was discovered that a few wet days rendered the shoe almost worthless the remainder of the lot, about 2,000 pairs, were left on his hands to be sold at a loss. These particular shoes are of a class that are jobbed in the United States at from 85 cents to \$1. While there was no complaint made as to the style and shape, the shoe was made of a cheap grade of porous leather, generally called buff stock, pasteboard inner sole, and composition bottom. This combination soon falls to pieces, and the purchaser learns that the shoe is not made of the same class of material that his home cobbler uses and for which he charges considerably more. From this it would appear to be more profitable for manufacturers and agents to encourage merchants here to purchase a good grade of shoes for adults, as poorer qualities, while they may pay a larger profit temporarily, will sooner or later destroy

the customer's confidence and his trade will be lost. The best American-made shoes handled here cost at home from \$30 to \$36 per dozen.

The importations of shoes, including a small amount of sandals, and other rubber footwear into Ecuador for the past four years aggregated \$117,079, the amounts from various countries being as follows:

Country.	1903.	1904.	1905.	1906.
United States	\$3,388	\$23,111	\$6,548	\$18,468
Spain	1,971	4,248	3,237	9,403
Great Britain	1,182	6,212	2,545	8,199
Germany	2,787	2,164	4,144	2,355
France	2,728	2,192	5,215	5,849
All others	253	125	890	375
Total.....	12,309	38,047	22,074	44,649

JAPAN.

IMITATION LEATHER WILL FIND MANY USES IN TRADE.

(From Monthly Consular and Trade Reports, May, 1907.)

Consul-General H. B. Miller, of Yokohama, reports that the promoters of the Japan Imitation Leather Company, of Tokyo, recently bought the business of the Tokyo Imitation Leather Manufacturing Company, and have fixed the capital of the new undertaking at \$250,000, the business advantages being as follows:

The imitation leather turned out by the company can be sold, quality for quality, at a quarter of the price of genuine imported leather, and it is claimed for appearance and durability it is in no wise inferior to the genuine article. It is anticipated that a larger market for the articles will be found in America and Asia. This is one line of manufacture that seems well adapted to the country in every way, and will, no doubt, have a successful future. So many cheap, light, and attractive articles can be made in Japan out of this imitation leather, both for home use and for export, that the demand for the product will be very heavy. Cheapness, neatness, and artistic appearances are prime essentials for a great variety of things used in the Orient, and imitation leather will furnish a material out of which many articles of common use will be made.

MEXICO.

AMERICAN MAKES IN DEMAND.

Consul-General Philip C. Hanna, of Monterey, made the following report in the Consular and Trade Reports for May, 1907:

There are no shoe factories in this part of Mexico. Common Mexican shoes are made in many small shops and worn by the poorer people, while nearly all shoes worn by the upper-class Mexicans come from the United States or Spain. Those of American manufacture are popular among all classes and generally worn by all persons who can afford them. Those of Spanish make usually have sharp-pointed toes, high heels, and often fancy decorations, but they are not as popular here as American shoes, and their sale is by no means as large.



For dress occasions and everyday wear high-quality shoes of American manufacture are in demand, and it is believed their sale will steadily increase. Low patent leathers are exceedingly popular; white, brown, cream, and shades are in demand for summer wear.

The Mexican people, as a rule, have smaller feet than Americans, and small sizes with high insteps are generally better suited for this market. There is a large mail-order business in American shoes between Monterey and American cities, the duty on the same being settled at the post-office on delivery. Several stores in Monterey handle none but American shoes.

TURKEY.

SOURCES AND CLASSES OF SUPPLY—SUBSIDIARY GOODS.

(From Monthly Consular and Trade Reports, May, 1907.)

Consul-General Edward H. Ozmun, of Constantinople, furnishes the following translation of extracts from the French Chamber of Commerce Bulletin published in the Ottoman capital:

Sole leather is imported into Turkey in rolls. One roll consists of half the hide of an ox cut in the center lengthwise. The weight of the current article averages 15 to 17 pounds. The estimated importation at Constantinople is 40,000 rolls. Of this total 45 per cent is imported from France, 30 per cent from Belgium, 20 per cent from Hungary, and 5 per cent from Italy.

Previous to the introduction of box calf in this market the sale of glazed calf reached 3,500 dozen per annum. This has now fallen to about 800 dozen, of which 300 dozen are for transit trade. This article comes almost entirely from France. The sale is principally in heavy skins, the weights varying between 40 and 66 pounds per dozen. The demand is mostly for second and third qualities. The sales of box calf amount to about 3,500 dozen per annum. It is stated that America formerly supplied the whole of this quality, but that the Germans engaged American foremen in their tanneries who have worked with such success that they have ousted the American product, the importation of which is said to have entirely ceased.

The sales of colored calf, which amounted to 500 dozen, have now been partly replaced by the colored grain calf and colored glazed kid and are now reduced to about 200 dozen, coming almost entirely from France.

The sales of colored grain calf are limited to about 100 dozen a year, coming mostly from Germany and only a small quantity from America. For colored footwear the glazed colored kid is being used more and more, being lighter, which in this country is a much-appreciated quality.

The natives have a fondness for patent-leather shoes. Turkish officials use it entirely for a light overshoe, which replaces the rubber overshoe; this overshoe is slipped off when entering a mosque or an official department, or when visiting. The sales amount to about 3,500 dozen, nine-tenths of which comes from Germany, principally from Worms and Weinheim.

At one time all the shoes worn with rubbers or patent-leather overshoes were made of dull kid. The sales were 7,000 dozen a year. Since the introduction of glazed kid these sales are reduced to about 2,500 dozen. Marseille has the monopoly of the market in this article. These kids are heavily charged with grease and weigh from 7 to 44 pounds per dozen. The lightest weights, 7 to 9 pounds, are used for ladies' shoes, being cheaper than the glazed kid.

KIDS AND COWHIDES.

Sales of shagreen (rough kid) amount to 200 dozen a year, imported entirely from Germany. Dressed kid, called chamois, replaces the glazed kid when the price of the shoe will not permit the use of the latter. The sales amount to about 2,500 dozen a year. The sales of plain colored kid amount to about 500 dozen a year, of which one-fourth are imported from Marseille, the remainder from Germany.

In regard to varnished cowhides, the local custom-house appraisers, accustomed to the small animals of this country, of which the largest do not exceed 6½ hundred-weight in weight, named them camel hides, and the name remains in the local market to this day; 1,200 hides are imported yearly, of which one-half come from

France and the remainder from Germany. The French hides, however, are somewhat smaller and generally preferred.

The sales of tawed calf, or *mégissés*, which at one time reached 2,000 dozen yearly, have dropped to almost nil, having been replaced by chrome-tanned kid. The sales of glazed kid, chrome tanned, has increased steadily in late years, to the detriment of tawed calf (*mégissés*), plain kid, and even glazed calf. America dominates the market in black glazed kid in virtue of its magnificent assortment. Certain American houses pride themselves on being able to offer 160 different kinds of glazed kid for quality, strength, and size. Three-quarters of the black glazed kid is imported from America, the remainder almost entirely from France, and very little from Germany. The colored glazed kid is imported mostly from France, a little from Germany, and even less from the United States. The sizes vary from 3 to 8 square feet. The total sales reach about 5,000 dozen a year.

The sales of varnished sheepskin are about 1,000 dozen yearly. It is used locally for a cheap shoe, and especially for children's shoes, and is imported entirely from France. Of white tawed sheepskin, or *mégis*, the sales are about 100 dozen, and it is used for babies' shoes. Spotted hairy calf is a French specialty and is used for making slippers. The total imports do not exceed 300 dozen. Split hides are imported exclusively from America, via Liverpool, in packets of 62 to 75 pounds, containing 14, 20, 25, or 30 split hides. The lighter the hides are in weight the higher the price, which varies from \$1.06 to \$1.28 per pound. The sales amount to 20 to 25 tons per annum. Quite a large quantity of this, however, is intended for southern Bulgaria. About 400 varnished split hides are imported from Germany and used for carriage mud guards. The sizes are from 3 to 4 meters square.

LEATHER FOR HARNESS—SOLE LEATHER CUTTINGS.

The black leather for harness is mostly furnished by local tanneries; of the remainder, one-quarter is imported from England and three-quarters from Germany.

During the last eight or ten years large quantities of cuttings of sole leather have been imported, coming from the large shoe factories in Europe. They are found suitable in this country for building heels. Shoes being made by hand, the shoemaker does piecework, and time is a minor consideration. The annual importation of these cuttings amounts to above 100 tons and the price varies from 2 to 8 cents a kilogram ($4\frac{1}{2}$ to $17\frac{1}{2}$ cents per pound). Germany furnishes the greater quantity; England but a small quantity. In reference to the local tannery the products have much improved on account of more careful work and the use of modern methods. The tannery prepares the hides of oxen, cows, and buffaloes of local slaughter and imports raw hides. It also tans skins, and while these will not bear comparison with the imported article their cheaper cost enables them to be used with profit in the making of cheap shoes.

The consumption of buffalo hides tanned red and white, camel hides, and light skins of 7 to 9 pounds per roll, coming from Smyrna, Samos, Chios, Mitylene, and Aivali, is considerable. It is estimated to attain three times the quantity imported from abroad. These products are used in the manufacture of cheap foot wear. The raw hides used in the tanneries in the archipelago are imported from China, Indo-China, India, and Egypt, via Havre, Antwerp, and Hamburg.

SIDE LINES AND SHOEMAKERS' REQUISITES.

Sales of elastic tissues diminished, owing to the fashion for elastic sides having been superseded; imports from France, Italy, Austria, and Switzerland. Of linen and cotton linings 10,000 pieces of 20 yards each are imported, coming almost entirely from England. Of shoemakers' thread \$19,000 worth is imported, principally from Italy and a small quantity from Belgium and England. Straps are imported from Germany; they are made with the shoemaker's name inwoven. Lasts are made locally, while a few are imported from Austria. Eyelets and buttons come from France. Laces are imported from Germany. Felt is imported from Germany for certain shoes and slippers. Cork soles are little used. Iron heels are used for the laboring classes and the army and are imported from Birmingham and a small quantity from Austria.

The dealers in skins in Constantinople are considered by the French Chamber of Commerce to be very reliable. [A list of these is furnished by the consul-general to the Bureau of Manufactures.] It is nevertheless to be recommended in opening relations to require satisfactory references. All letters should be marked "Via London, open mail." A New York house has a branch in Constantinople.

ASIATIC TURKEY.

PROSPECTS FOR AMERICAN FOOT WEAR IN THE LEVANT.

(Consul E. L. Harris, of Smyrna, Monthly Consular and Trade Reports, June, 1907.)

Patent-leather shoes, especially those made on American lasts, are considered indispensable to the well-dressed man in the Levant, but with this solitary exception, the long and narrow shoe, well pointed at the toe, known locally as French shape, practically holds this market. While a considerable quantity of ready-made shoes, chiefly those for ladies' wear, are imported from France and Austria, the bulk of the trade is supplied by local shoemakers, who work extremely cheap and well. With the exception of part of the sewing being done by machine, the whole is made by hand. The better class of the Turkish population wear a shoe made of very thin leather, having a closely fitting overshoe of slightly thicker leather, which is worn when out of doors. In all native houses the floors are either covered with matting or thick Turkish carpets, either of which show the least trace of mud or dust on them, making it imperative that great care should be taken to keep clean boots, hence the large number of bootblacks found in every Levantine city. Shoes made on the American pattern do not, as a rule, find favor, and although they may become so at some later date, American shoe manufacturers must, if they intend to sell through catalogues, make shoes on the French pattern. If the American patterns are to be introduced it would be a good plan to open stores in the chief cities of the Levant where nothing but American shoes would be sold.

TRADE IN RUBBER OVERSHOES.

Germany at present has the largest trade in rubber overshoes with this province, and her annual exports amount to about 1,000 cases, each containing 100 pairs. America's share approximates 700 cases, which contain either 2 or 4 dozen pairs each. The imports from Russia, which now are perhaps not more than 200 cases per annum, have dwindled very considerably from what they were three years ago, owing to the disturbed state of her manufacturing districts. While the American overshoe is preferred by the better classes on account of its lightness and shape, it has the defect of not being nearly as durable as the German article, and is moreover 15 per cent higher in price. The German manufacturers grant three to six months' credit, while the American exporter demands cash, a stipulation not much appreciated by the Levantine merchants. The bulk of the worn-out rubbers are shipped to the United States for the sake of the rubber. The quantity last year was valued at \$817. Repairs to overshoes are done very skillfully by local experts, who will repair a shoe which seemingly is of no use.

FAVORABLE OPPORTUNITY.

MARKET READY FOR AMERICAN MAKES.

(From Monthly Consular and Trade Reports, July, 1907.)

After a visit to the leading shoe stores of Smyrna, Consul Harris was prompted to take up again the matter of boots and shoes, and bring the following particulars to the attention of American manufacturers who may wish to do business there in that line:

